DOCUMENT RESUME

ED 287 210 EA 019 725

TITLE	The School Foodservice Handbook (A Guide for School Administrators).
INSTITUTION	Association of School Business Officials International, Reston, VA.
REPORT NO	ISBN-0-910170-48-7
PUB DATE	87
NOTE	107p.; Portions contain small print.
AVAILABLE FROM	Publication Sales, ASBO International, 1760 Reston Avenue, Suite 411, Reston, VA 22090 ($11.95).
PUB TYPE	Guides - Non-Classroom Use (055) -- Books (010)
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Breakfast Programs; *Childhood Needs; Elementary Secondary Education; *Food Service; *Food Standards; *Lunch Programs; *Nutrition; Student Needs
IDENTIFIERS	*Child Nutrition Act 1966; Food and Nutrition Service; *National School Lunch Act 1946; School Breakfast Program

ABSTRACT

School food service should be considered a vital aspect of school operations, not an appendage to the educational program. This handbook revolves around the federal Child Nutrition and National School Lunch program serving about 24 million pupils daily in over 90 percent of the nation's 89,200 public schools. The booklet helps explain various rules and regulations governing these and other federal nutrition programs and their management at state and local levels. The first chapter discusses the different responsibility levels and highlights the special populations served (Head Start, handicapped, and allergic youngsters) and various management approaches. The second chapter, on financial management, considers revenue sources, pricing, recordkeeping, budgets, and other functions. The third chapter, on personnel, covers job descriptions, responsibilities and qualifications, employment practices and procedures, and staffing and classification. The fourth chapter discusses production and service operations, while the fifth chapter covers food purchasing, storage, and inventory control. The final chapter, on sanitation and safety, looks at food and chemical poisoning and ways to prevent it. Also included are appendices on state administrative review, federal procurement standards, and invitations to bid. (MLH)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED287210

The School Foodservice Handbook

(A Guide for School Administrators)

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☒ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY

R. Allen

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

EA 019 725

Asso[illegible] of S[illegible]ol Bus[illegible]s Offi[illegible] Internat[illegible]

The School Foodservice Handbook

(A Guide for School Administrators)

3

Association of School Business Officials International

1987 BOARD OF DIRECTORS

EXECUTIVE COMMITTEE

President
Dr. Jack D. Oatley, RSBA
Assoc. Supt. for Admin. Services
Kent Intermediate School Dist.
2650 E. Beltline SE
Grand Rapids, MI 49506
616/949-7270

Past President
H. Ronald Smith, RSBA
Business Administrator
Essex County Vocational Schools
68 South Harrison Street
East Orange, NJ 07018
201/676-0955

President-Elect
S. Fred Hawkins, RSBA
Asst. Supt. of Finance & Operations
Kirkwood R-7 Schools
11289 Manchester Road
Kirkwood, MO 63122
314/965-9510

Vice President
Donna R. Gloshen, RSBA
Business Manager
Educational Serv. Unit 3
4224 South 133rd Street
Omaha, NE 68137
402/330-2770

Executive Director
Ronald A. Allen, CAE
ASBO Headquarters
1760 Reston Avenue/Suite 411
Reston, VA 22090
703/478-0405

DIRECTORS

1985–87

Gerald B. Brashears, RSBA
Asst. Supt./Business Services
Abilene Independent Sch. Dist.
842 North Mockingbird/Box 981
Abilene, TX 79604
915/677-1444

Donald C. Mercure, RSBO
Business Manager
South Windsor Public Schools
1737 Main Street
South Windsor, CT 06074
203/528-9711

1986–88

Dr. E. Rabon Rodgers, RSBA
Assoc. Supt. for Finance
Richland County Sch. Dist. #2
6831 Brookfield Road
Columbia, SC 29206
803/787-1910

Paul F. Swinford, RSBA
Treasurer
Valley View Schools 365/U
755 Luther Drive
Romeoville, IL 60441
815/886-2707, Ext. 104

1987–89

John (Jack) H. Morris, CA, RSBA
Supt. of Bus. & Treas.
London Board of Education
P.O. Box 5888 1250 Dundas Street
London ON Canada N6A 5L1
519/452-2023

William H. Sullivan, RSBA
Asst. Supt. for Business
N. Rockland Central Schl. Dist.
117 Main Street
Stony Point, NY 10980
914/942-2700

1986–88 Chairman, ASBO Exhibitors' Advisory Committee
Kenneth W. Dahlager, V.P. Sales
Smith System Manufacturing Co.
P.O. Box 64515
St. Paul, MN 55164
612/636-3560

The School Foodservice Handbook
(A Guide for School Administrators)
Copyright © 1987 by the Association of School
Business Officials International

Printed in the United States of America (002872M)

For more information or to purchase additional copies contact:

ASBO INTERNATIONAL
1760 Reston Avenue, Suite 411
Reston, Virginia 22090
703-478-0405

ISBN No. 0-910170-48-7

TABLE OF CONTENTS

Acknowledgments vi

Foreword vii

Introduction viii

I. ADMINISTRATION OF FOODSERVICE AT SCHOOL 1

A. Child Nutrition Programs 1
1. National School Lunch Program 1
2. Free and Reduced-Price Meals 2
3. School Breakfast Program 2
4. Special Milk Program 3
5. USDA Distribution Program 3
6. Home Economics 4
7. Nutrition Education and Training Program 5

B. Responsibilities for Child Nutrition Programs 5
1. Federal Level 5
2. State Level 6
3. School Food Authority Level 7

C. A la Carte Offerings 9
1. Competitive Food Sales 9

D. Serving Special Children's Needs 10
1. Handicapped Children 10
2. Allergies Among Students 10
3. Head Start Children 11

E. Serving the Community 11
1. Pre-School Programs and Day Care 11
2. Summer Feeding 11
3. Senior Citizens 11
4. Emergency Feeding 12
5. Banquets and Special Functions 12

F. School Managed or Management Contract 12

G. School Managed—Centralized or Decentralized 14

II. FINANCIAL MANAGEMENT 16

A. Revenue Sources 16
1. Federal Cash Reimbursement 16
2. State and Local Support 17
3. Income From Price Charged to Students and Adults 17
4. Other Sources of Revenue 17

B. Pricing Meals and Services 17
1. Price Structure of Meals 17
2. Charging 17
3. Free Meals for Adults 19

C. Handling Tickets, Rosters, and Cash 19
1. Handling Tickets and Rosters 19
2. Numbering System 20
3. Handling Cash—Making Change 20
4. Counting Money 20

D. Maintaining Records 21
1. Participation and Revenue 21
2. Use of Funds 22

E. Budgets 22

III. PERSONNEL 23

A. Position Job Descriptions, Responsibilities, and Qualifications 23
1. Foodservice Directors/Admministrators 23
2. Foodservice Supervisor/Specialist 25
3. Foodservice Manager 27
4. Technical Assistant 28
5. General Assistant 29

B. Employment Practices and Procedures 30
1. Vacancies 30
2. Fringe Benefits 31
a. Lunch as a Fringe Benefit 31
b. Sick Leave 31
c. Retirement Plan 32
3. Employment Physicals 32
4. Absences 32
5. Salary Plan and Scale 32

C. Staffing and Classification 33
1. Staffing Formula 33
2. Classification of Foodservice Manager 35
3. Destaffing 36
4. Evaluations 36
5. Disciplinary Actions 37
a. Unsatisfactory Service Separation 37
b. Resignation 44
c. Grievance Procedure 44

IV. PRODUCTION AND SERVICE 45

A. Type of Production 45
1. On-Site Production 45
2. Satelliting 45
3. Use of Convenience Foods 45

4. Commodity Processing 46
B. Menu Planning 46
1. School Lunch Pattern 47
2. Offer Versus Served 47
3. Breakfast Meal Pattern 51
C. Production Records 52
V. PURCHASING OF FOOD AND SUPPLIES, STORAGE, AND INVENTORY CONTROL 54
A. Purchasing 54
1. Bid Buying 55
2. Collective Purchasing 56
B. Specifications 56
1. Standards of Identity 61
2. Child Nutrition Label 63
C. Processing U.S.D.A. Commodities 63
D. Receiving and Storage 63
1. Checking in Deliveries 63
2. Proper Storage of Food 64
3. Organization of Dry Storage Area 64
4. Refrigerated Storage Area 67
5. Freezer Storage Area 67
6. Central Warehouse 67
E. Inventory Control 68
1. Physical Inventory 68
2. What Is To Be Inventoried? 68
3. Perpetual Inventory 69
VI. SANITATION AND SAFETY 71
A. Food Poisoning 71
1. Food-Borne Illness 72
2. Preventing an Outbreak of Food-Borne Illness 74
3. Prevent Bacteria Growth 75
B. Chemical Poisoning 76
Appendix I State Administrative Review 77
Appendix II Federal Standards Governing Procurement 90
Appendix III Invitation to Bid 94
Index 96

ACKNOWLEDGMENTS

It is with gratitude and appreciation that we acknowledge the research and work of the following people on School Food and Nutrition Management Research Committee of the Association of School Business Officials.

Gerald B. Smith, Chairman
Director of Finance
Jackson County Intermediate School District
6700 Browns Lake Road
Jackson, MI 49201

Dorothy VanEgmond-Pannell, Vice-Chairman for Research and Project Coordinator
Director, Food Services
Fairfax County Public Schools
6800 B Industrial Road
Springfield, VA 22151

Ronald A. Stainbrook, Vice-Chairman for Program
Acting Chief, Division of Management Assistance
Pennsylvania Department of Education
333 Market Street
Harrisburg, PA 17126-0333

Members of committee who contributed:

James Matthews, Jr.
Assistant Superintendent for Finance & Operations
Copiague Public Schools
Great Neck Road
Copiague, New York 11726

Kathleen Peña
Supervisor of Food Service
Murphy School District 21
2615 W. Buckeye Road
Phoenix, Arizona 85009

Wayne D. Wong, R.D.
Director of Food Services
Bakersfield City School District
1300 Baker Street
Bakersfield, California 93305

FOREWORD

Since the earliest days in our country's history, educators have realized the need to feed poor children in schools. Few children can have eager minds with empty stomachs.

The National School Lunch Act, passed in 1946, put the government on record as supporting school children's lunches, but it wasn't until the Child Nutrition Act of 1966 that government funds came close to matching the cost of providing free lunches for needy children.

During the past decade, federal funds for school food programs have scarcely kept up with inflation and districts often are forced to carefully monitor the costs of their breakfast and lunch programs.

This book is designed to provide useful information to school administrators who are interested in establishing or improving the operation of school foodservice programs.

Its goal is to raise the level of professional competence in this critical operational area of school management.

I and the other members of the Board of Directors of the Association of School Business Officials International commend the volunteers from the School Food and Nutrition Management Research Committee for their efforts in producing a worthwhile publication of which the association can be proud.

Dr. Jack D. Oatley, RSBA
1987 ASBO International President

INTRODUCTION

Dr. Ridgley M. Bogg, the 1970 President of the Association of School Business Officials, delivered a speech to the annual American School Food Service Association that makes an excellent introduction to this handbook. He beautifully sums up the purposes, goals, and challenges that face school administrators still today.

School foodservices is a vital, basic, and important aspect of school operations. It must not be viewed as an appendage to the educational program. School meals must be developed as an integral part of the educational process carried on within the school system. Failure to accept this principle reduces the school foodservice to a feeding plant and, as such, it does not have a place in the school. A properly operated school foodservice program will contribute to the health of the child, will offer an opportunity for the child to learn desirable food habits, and will make it possible for the staff to correlate the food program with classroom instruction.

. . . Tomorrow's school foodservices will not only provide lunch for children at school, but will provide breakfast, lunch, and snacks for the pre-school children, students, and staff, dinner or supper for night students, and meals for participants in summer recreation activities. The serving of three meals a day, all year around, is not far away and school may soon be feeding senior citizens and probably the entire poverty level families.

School foodservices are caught between the conflict of the goal to end hunger in America and the refusal of many school boards to assume responsibility, moral or financial, for the foodservice program.

School boards tell their foodservice directors or managers that they either operate on a self-sustaining basis or close shop. School foodservice was set up with the philosophy and principle that it should serve food to children and was not originally intended to be self-sustaining. The implications of the origins of school foodservice are that: (1) all children need food; (2) a hungry child cannot learn and that the school day's nutritional needs should be provided at school whether or not the child can pay; (3) school foodservice should be as basic to school as books, classrooms, and playgrounds; and (4) public financial support must be available for school foodservice to all children. The poor need nutrition, and so do the middle class and rich. The child's nutritional status has direct influence on his physical and mental development as well as on his ability to learn and relate to his peers and his teacher. . . .

CHAPTER I

ADMINISTRATION OF FOODSERVICE AT SCHOOL

In the mid 1980s, over 90% of the public schools (89,200) participated in the Child Nutrition and National School Lunch Programs, serving a nutritional lunch to an average of 23.9 million children each day. These federally subsidized programs provide funding and regulations. This handbook will deal primarily with administering foodservices at the school level in compliance with these federal programs.

The National School Lunch Act was passed by Congress and signed into law in 1946, and the Child Nutrition Act followed in 1966. They complement each other and have been amended many times since their creation. It is under these laws that federal monies are appropriated each year. The programs that operate under these laws are known collectively as the Child Nutrition Programs.

CHILD NUTRITION PROGRAMS

The Child Nutrition Programs are administered at the National level by the Department of Agriculture, Food and Nutrition Service (FNS). State educational agencies are responsible for program operations within their state. In states where administration of the programs for private schools and institutions is prohibited by law, FNS administers the programs directly through its regional offices. The programs under these laws are:

(1) National School Lunch
(2) School Breakfast
(3) Special Milk
(4) USDA Donated Commodities/Food Distribution
(5) Nutrition Education and Training
(6) Child Care Food
(7) Summer Food Service for Children
(8) Emergency Food Assistance

National School Lunch Program

The National School Lunch Program is available to any non-profit school. It is the oldest of the programs, and by far, the largest. There are numerous requirements/regulations handed down to the state. For example, there is a specific menu pattern that must be followed. And, the needy children must be served at reduced-price rates or free. The meal pattern is shown in Illustration IV.A, page 48 and further discussed in Chapter IV, *Production and Service*. Many of the regulations governing the program center around the meal pattern requirements, which specify

portion sizes. State reviews and federal audits are made to assure the meal pattern is being made available.

"Offer versus Serve" is a law that allows students a choice. It requires that high school students be given the choice. The local school district has the privilege of deciding if "offer versus serve" will be carried out in the elementary and intermediate/junior high/middle schools.

Prices charged the paying students are established by local authorities. There is a maximum established by regulation that can be charged those who qualify for reduced-price meals, e.g., in 1987 the maximum was 40 cents for a reduced-price lunch.

Free and Reduced-Price Meals

If a school participates in the National School Lunch and Child Nutrition Programs, it must agree to accept the responsibility for providing free and reduced-price meals to eligible children in the school. A letter to parents explaining the availability of free and reduced-price meals is provided by the state department of education each summer. An application for free and reduced-price meals and a current income scale must be made available for distribution to all children. State departments of education require that the policy statement for free and reduced-price meals be filed in the office of each school principal and held for audit purposes.

School Breakfast Program

The Breakfast Program was established under the Child Nutrition Act of 1966 as a pilot project, and was made a permanent program by Public Law 94-105 in 1975. The School Breakfast Program reimburses states at certain rates for each breakfast served and is available to all public schools. The rates vary according to the family income of the participating child. Schools designated as in ***severe need*** receive increased assistance. A Breakfast Program is particularly recommended in schools where there is large number of students eligible for the free and reduced-price meals, and where there are large numbers of students with working mothers. Texas, Massachusetts, and many other states have mandates regarding breakfast. However, funding may not cover costs because participation is usually low. Many school districts have determined that it is not economically possible to operate a breakfast program serving less than 25.

School breakfasts provide a good start toward meeting a child's daily nutritional need of food energy, protein, vitamins, and minerals. There is reason to believe that a regular breakfast enhances a student's academic response.

The School Breakfast Meal Pattern is established by USDA. It states that breakfast shall contain as a minimum the following food components:

(1) *Fruit or Vegetable*—A serving is one-half cup of full-strength fruit or vegetable juice or fruit or vegetable. Fruit punch, fruit ade, powder mixes, or fruit drinks are non-reimbursable and should not be served in the breakfast program.

(2) *Bread or Bread Alternate*—One serving is equal to one slice of whole-grain or enriched bread; or an equivalent serving of cornbread, biscuits, rolls, muffins, etc., made of whole-grain or enriched meal or flour; or three-fourths cup or one ounce, whichever is less, serving of whole-grain or enriched or fortified cereal; or an equivalent of any combination of those foods.

(3) *Milk*—One-half pint must be served as a beverage or on cereal or used in part for each purpose.

"Offer versus serve" was extended to the Breakfast Program in 1987 by Public Law 99-661 in order to help eliminate waste. The regulations for carrying this out in the Breakfast Program should be carefully checked with the state supervisor before beginning implementation.

To improve the nutrition of the participating children, breakfast should also include, as often as possible, a meat or meat alternate, such as one egg, one-ounce serving of meat or cheese, or two tablespoons of peanut butter. Congress increased funding in 1987 for that purpose.

For *severe-need* eligibility, which means additional funding, the school must serve in the two preceding school years 40 percent or more of the lunches free or at a reduced price. Also, there must be evidence that the regular breakfast reimbursement is insufficient to cover the costs of the breakfast program.

Special Milk Program

The special milk program is designed to encourage fluid milk consumption by selling milk to students at the lowest possible price and serving milk free to students determined to be eligible. This program was available through 1986 only to schools not participating in the National School Lunch Program and/or School Breakfast Program. Public Law 99-661 extended the special milk program to kindergarten children, who do not have access to the breakfast and/or lunch program because of half-day or part-day schedules.

USDA Distribution Program

The United States Department of Agriculture (USDA) offers available foods to each state for use in some of the Child Nutrition Programs. Congress annually appropriates funds to the USDA for purchase of "commodity/donated foods" to assist localities with the food budget and the farmer with surplus. The quality of foods purchased vary from time to time. The manager is responsible for seeing that the commodities are stored properly and utilized.

USDA acquires foods for donation under three authorizations:

Section 6 (National School Lunch Act). The foods purchased with these funds are restricted to the schools participating in the National School Lunch Program and are to be used only in preparing pattern lunches. They *cannot* be used in a la carte programs or for special functions or by any other department of the school.

Section 32 (Public Law 320 as amended in 1936). If a school receives Section 32 commodities with the letter R in front of the 32 (R32), this indicates that the commodity is restricted and is to be used in the same manner as Section 6 commodities.

Section 416 (Agricultural Act of 1949). May be used in all phases of the school feeding program.

Donated foods may change in variety from time to time. Foods available from price-support and surplus-removal programs may vary according to market conditions. Foods purchased especially for the National School Lunch Program from foods appropriated for that program are selected by the Consumer and Marketing Service, USDA. Selections are based on the nutritional needs of the child, recommendations of the school lunch officials of the various states, and market supplies and prices.

The following instructions on commodities are excerpts from the *Information Bulletin and Instruction Guide of the Oklahoma Department of Institutions, Social and Rehabilitative Services:*

Allocation of Commodities: Commodities are offered to schools on an "offer and acceptance" basis with the exception of Section 6 items purchased from the National School Lunch appropriations. These items are allocated as they become available to schools participating in the National School Lunch Program on the basis of the certified approved participation.

Lost, Spoiled, or Damaged Commodities: Schools are financially responsible for commodities lost through spoilage or theft due to negligence or failure to provide adequate protection in the way of proper storage or protection of the commodities in possession of the school. If a school district experiences a substantial loss of commodities due to spoilage, infestation, fire, or theft occurs, it should be promptly reported to Food Distribution at the state level together with a full explanation of the circumstances connected with the loss. Damaged commodities should be inspected by the local health officer or sanitarian and disposition made in accordance with his instructions. Losses occurring as a result of theft or break-in should be investigated by local peace officers and a copy of their report enclosed with the report of loss. A report of loss by fire should include a statement of the fire chief or other official who investigated the fire.

Inventories: The inventories indicating the supply of the various items of commodities on hand and the length of time they will last are very vital reports. Schools are required to submit inventory reports during the school year whenever called for by the State.

Special Distributions: There will be occasions when highly perishable commodities will be allocated to the schools. They will have been stored at a low degree temperature prior to distribution to the schools. It will, therefore, be absolutely necessary that schools arrange to accept delivery of these items at the exact time specified in the Notice of Arrival which will be mailed sufficiently in advance of arrival to permit schools to provide proper storage for the type of commodities being distributed. These items will not be distributed at the regular time due to their highly perishable nature but will be items for special distribution.

Disaster Feeding: In case of disaster caused by floods, fires, hurricanes, explosions, etc., Sections 32 and 416 items may be used. Section 6 may also be used and must be paid for and replaced following the disaster by the using organization and in the case of public disaster, it will probably be the Red Cross.

Requirements: Schools receiving commodities are required to maintain records of the amounts received and used for a period of three years. USDA foods cannot be *sold* or *traded*. It is the duty of the school receiving the commodity to inspect the delivery noting the amount received before signing the receipt. The school is held responsible for properly storing and using the commodity.

Home Economics

Home Economics classes are eligible to receive bonus commodities through the school's lunch program if desired. The State Commodity Director can identify

those foods and the school foodservice can then transfer them from their inventory to the inventory of the home economics department. However, the quantities distributed to the schools may not be increased. In the case of bonus commodities, where during the 1980s the supply is basically unlimited, this can be a way of using more commodities and helping a local program.

Nutrition Education and Training Program

The Nutrition Education and Training Program provides funds to the states for the dissemination of nutrition information to children and for inservice training of foodservice and teaching personnel. States use this money for a variety of items.

RESPONSIBILITIES FOR CHILD NUTRITION PROGRAMS

The following is taken from the *Mississippi Policy and Procedure Manual for Child Nutrition Programs*.

> The effectiveness of the Child Nutrition Program is dependent upon the full support and cooperation of all program administrators at the federal, state, and school food authority levels. The following is a listing of the responsiblities of each level.

FEDERAL LEVEL

At the federal level, the Food and Nutrition Service shall act on behalf of the United States Department of Agriculture in implementing the Child Nutrition Programs. It shall be responsible for:

1. Providing timely information to the Administration and to Congress;
2. Drafting, updating, and publishing in the *Federal Register* regulations to implement the National School Lunch Act and the Child Nutrition Act, as amended by Congress;
3. Soliciting public comment prior to issuing federal regulations in their final form;
4. Conducting briefing sessions and/or public hearings concerning national policies related to school foodservice;
5. Annually completing a contract with each state educational agency for administration of the School Lunch, School Breakfast Program, and Food Distribution Programs;
6. Allocating federal funds by means of an annual letter of credit to each state agency agreeing to administer the various Child Nutrition Programs;
7. Developing prototype contracts, reporting forms, agreements, policy statements, financial management systems, application forms and review and evaluation forms for use in administration of the programs;
8. Developing and disseminating policy statements, instructions, time frames, guidelines, and memorandums related to program management.
9. Developing national policy concerning the provision of free and reduced-price meals, including poverty guidelines and prototype applications and administrative guidance;
10. Annually reviewing and evaluating each state agency together with selected school food authorities for each Child Nutrition Program administered; initiating corrective plans when necessary;
11. Developing specifications and issuing bids for the purchase of foods to be distributed to Child Nutrition Programs;

12. Allocating and shipping government-donated foods to each state;
13. Monitoring the state's government-donated foods distribution program;
14. Providing budgetary information to the Administration and to Congress;
15. Revising proposed budgets in terms of authorized and budgeted expenditures;
16. Collecting, processing, and collating monthly participation reports;
17. Processing and updating each state's letter of credit to reflect program activities;
18. Annually updating reimbursement rates for school lunch, school breakfast, and child care;
19. Preparing and distribution of program aids;
20. Preparing and distributing suggested training materials for school foodservice personnel, nutrition education, and parental involvement;
21. Developing criteria to measure the nutritional quality of foods and beverages to be served in schools;
22. Cooperating with community groups, professional associations, and allied agencies to evaluate program effectiveness;
23. Negotiating contracts with appropriate agencies to conduct surveys, evaluations, and special research projects.

STATE LEVEL

Federal regulations require that the amount of state revenues appropriated for the operation of the National School Lunch Act shall not be less than 30 percent of the funds received by the state under Section 4 of the National School Lunch Act. However, if the per capita income of any state is less than the national average per capita income, this matching requirement will be reduced proportionately. State Child Nutrition supervisors help assure the local school districts are carrying out the requirements—both federal and state through administrative reviews, which usually are done every three years. See Appendix I for a sample review form. It will help for a manager and/or local administrator to review the state adminstrative forms so as to be sure that the schools are in compliance and to know what types of questions to expect.

Program Management

State Department of Education is responsible for:

1. Annually negotiating contracts with School Food Services Authorities (SFA);
2. Developing prototype policy statements and supporting exhibits for provision of free and reduced-price meals and approving policy statements submitted by each SFA;
3. Timely draw-down of federal funds to pay claims for reimbursement;
4. Timely processing and paying of monthly claims for reimbursement;
5. Preparing of monthly financial status reports and timely submission to USDA;
6. Annual reviewing of net cash resources at the SFA level to determine nonprofit status of program operations;
7. Monthly reconciling of state and federal subsidiary accounts;
8. Preparing annual state and federal budget requests for the succeeding fiscal year (State—July 1 through June 30, Federal—October 1 through September 30);
9. Reviewing of SFAs in accordance with USDA regulations;

10. Auditing of SFAs on a bi-annual schedule in accordance with USDA Audit Guides;
11. Scheduling and completing on-site visits to provide technical assistance and/or follow-up visits;
12. Assessing SFAs for overclaims identified as part of the audit reports of AIMS review; providing of technical assistance as a result of AIMS review;
13. Implementing a competency based training program for local school foodservice personnel; assisting SFAs with local school foodservice training programs where necessary;
14. Developing and implementing on-going training programs for supervisory and administrative personnel (SFA);
15. Certifying school lunch managers and supervisors through approved courses at junior colleges or universities;
16. Maintaining records of certified managers and courses completed;
17. Reviewing and approving proposed plans and layouts for foodservice facilities;
18. Preparing and distributing training materials, program aids, and guidance material;
19. Continuously reviewing and evaluating USDA regulations and instructions as published in the *Federal Register* (proposed, interim, and final regulations) or as issued by the USDA Regional Office (guides, handbooks, instructions, memorandums, and reports); notifying SFAs of USDA regulations and policy guidelines on a timely basis;
20. Establishing, organizing, and convening State Advisory Councils and Advisory Committees to maintain liaison with participating agencies; cooperating with national, state, and local agencies in implementation of an on-going nutrition education and training program which meets the identified needs of the state;
21. Acting as distribution agency for all foods donated to schools in the state;
22. Continuously evaluating the program effectiveness.

SCHOOL FOOD AUTHORITY LEVEL

At the local level, each school food authority (SFA) is responsible for:

1. Annually completing contracts with the state department of education;
2. Submitting the SFA's policy statement for provision of free and reduced-price meals and providing copies of SFA's approved policy statement to all participating schools;
3. Distributing copies of applications for free and reduced-price meals together with copies of the state administrative guidance materials to all participating schools;
4. Advise all parents concerning the types of foodservice programs available at the school and surveying the need for additional programs when these are not available;
5. Distributing at the beginning of each school year applications for free and reduced-price meals to each student enrolled in school;
6. Reviewing and approving, in accordance with state administrative guidance materials, each application for free and reduced-price meals;
7. Verifying, with the applying parent, any incomplete, illegible or questionable information entered on the application for free and reduced-price meals;

8. Approving all eligible, complete applications, and denying all applicants which do not meet eligibility guidelines. Such approval or denial must be entered on the application in the appropriate areas and the parents must be notified by mail within ten working days after the completed application has been returned to the schools;
9. Ensuring that all children within a family in a SFA receive the same benefits;
10. Developing and implementing appropriate hearing procedures and implementation of a standard review procedure to be used in the approval of applications for free and reduced-price meals; monitoring school procedures in the approval of applications for free and reduced-price meals, collection procedures for meal payment, point of service count, and avoidance of overt identification of needy children;
11. Developing and implementing a verification procedure to confirm eligibility for free and reduced-price meal recipients;
12. Establishing a procedure for obtaining accurate meal counts at the serving line so that accurate reports of daily student participation by category are entered on the daily reporting form;
13. Maintain all records pertaining to Child Nutrition Programs (including menus, production records, invoices, bills, financial reports, and inventories) for three years plus the current school year;
14. Verifying and consolidating schools' monthly reports of participation and claims for reimbursement; promptly submitting the SFA's consolidated monthly claim;
15. Consolidating schools' financial data each month; submitting report to state department; documenting reported income and expenditures and retaining documentation for three years plus current operating year;
16. Reviewing and approving building renovation lay-outs, plans, and purchasing contracts; reviewing major foodservice equipment purchases; developing, implementing, and maintaining an inventory control system for foodservice equipment;
17. Establishing and implementing purchasing procedures in compliance with state and federal regulations;
18. Establishing standard procedures for maintaining inventories of purchased and government-donated foods and supplies;
19. Agreeing to act as a recipient agent for government donated-foods; agreeing to the conditions established by the state department for use of commodities; maintaining records related to commodities for three years plus the current school year;
20. Developing and implementing a viable financial management system which meets state and federal requirements;
21. Planning and/or approving school foodservice menus prior to and during service to ensure that all nutritional requirements are met;
22. Providing assistance to school foodservice personnel in planning menus which provide choices within the required meal components to students;
23. Providing alternate meal services (plate lunch and box lunch, salad plate and regular plate lunch) to increase participation;
24. Organizing student advisory councils to assist in menu planning, publicity, and observance of special days in the cafeteria;

25. Maintaining a regular schedule of on-site visits to participating schools; monitoring and scheduling follow-up visits to schools to ensure program compliance; accompanying state and/or federal representatives on local school visits;
26. Providing technical assistance to school foodservice personnel, school administrators, and clerical personnel;
27. Developing and implementing an on-going training program for foodservice personnel, school clerical personnel, and school administrators;
28. Developing standard policies regarding employment practices, grievance procedures, supervision and training of foodservice personnel;
29. Maintaining liaison with parents, students, community groups, and the administration to promote good public relations;
30. Remaining informed concerning federal and state regulations and policies concerning various Child Nutrition Programs.

A LA CARTE OFFERINGS

A la carte foods are becoming more common. Permission to sell a la carte may require a local school board's approval. Some of the reasons for making a la carte foods available are:

1. Additional energy sources are provided for students who need them.
2. A supplement is provided for students who bring their lunch from home.
3. An alternate is provided to students who cannot afford the price of lunch.
4. Additional income is provided to use in the school foodservice program.

Those who oppose a la carte foods being sold are usually concerned about students not eating a nutritionally well-balanced meal. If there is a high percentage of the students receiving free and reduced-price meals, offering a la carte may be unadvisable.

Competitive Food Sales

In 1984, the Federal competitive food regulation was overturned in court and has become nearly non-existent. Local school districts are encouraged to adopt their own. Some states have competitive food regulations, as have Mississippi and Virginia. The original federal "Competitive Food Regulation" could be used as a start. It reads as follows:

> The following items cannot be sold anywhere on the school premises *from the beginning of the school day, until the end of the last lunch period:*
>
> Carbonated Beverages
>
> Water Ices (except those containing fruit or fruit juices)
>
> Chewing Gum - Flavored products from natural or synthetic gums and other ingredients which form an insoluable mass for chewing.
>
> The following types of candy:
>
> Hard Candies - A product made predominantly from sugar (sucrose) and corn syrup which may be flavored and colored, is characterized by a hard, brittle texture, and includes such items as sour balls, fruit balls, candy sticks, lollipops, starlight mints, after dinner mints, sugar wafers, rock candy, cinnamon candies, breath mints, jaw breakers, and cough drops.

Jellies and Gums - A mixture of carbohydrates which are combined to form a stable gelatinous system of jelly-like character, and are generally flavored and colored, and include gum drops, jelly beans, jellied and fruit-flavored slices.

Marshmallow Candies - An aerated confection composed of sugar, corn syrup, invert sugar, 20% water and gelatin or egg white to which flavors and colors may be added.

In Fairfax County, Virginia, the policy regarding the sale of food has been established in order to assist students in establishing sound nutritional habits, to assure that sanitary food practices are maintained, and to preserve a sound financial status in the school feeding program. The policy states:

1. No food or beverage will be offered for sale to students before or during the scheduled school day on the school premises by other than an individual school's foodservices department.
2. No school or organization will contract for or offer on its own at other times any sale of food or beverage to students in competition with an established foodservices program.

SERVING SPECIAL CHILDREN'S NEEDS

Handicapped Children

The Education for All Handicapped Children Act, Public Law 94-142, mandates that public schools provide appropriate education in the least restrictive setting for all handicapped children, ages 3 through 21 years. As a result of this legislation, many handicapped children are now being educated in the general school environment.

Schools are not required to provide special diets for any students; however, school districts do have to meet the nutritional needs of their handicapped children. If state and federal requirements for the meals are met, the meals may be claimed for reimbursement from the Child Nutrition Program.

Meal service to children with special needs may involve some changes in the physical set-up of the cafeteria and menu. It may not be possible to carry out "offer versus served" even though the children are high school aged. The school district should obtain an approval for an exception from the state.

Allergies Among Students

Regulations governing the federal lunch and breakfast programs permit food substitutions for individual children with medical or other special dietary needs. The regulation allows substitution "only when supported by a statement from a recognized medical authority which includes recommended alternate foods." In some states, a recognized medical authority need not be limited to a doctor. Since most allergies are continuous, it is not necessary for a new statement to be secured each year. This statement should be transferred to the current file each year. However, since some states may require a new statement each year, it is wise to check with the state.

In the case of a milk allergy, juice may be substituted when the verification of the allergy is in the manager's files. At the time of audit by the state supervisor or the USDA auditors, these verifications of allergies are reviewed. Substitution for

other components of the lunch should be discussed with the state supervisor, and a "special exception" may need to be obtained.

Head Start Children

Children enrolled in the Head Start programs may receive a breakfast and/or lunch meeting meal pattern requirements for the appropriate age group. If approved by state, the school may claim and receive federal and state reimbursements under the National School Lunch Act and the Child Nutrition Act as for any other child's meals.

Head Start is for pre-school, low-income children. Normally a hot lunch and snack are provided each day, and in some cases, breakfast. Those children whose family income qualifies can receive these meals and snacks free or at a reduced price. It is important to determine if the meals are to be claimed in the regular monthly report, or if the Head Start program should be billed for the service.

SERVING THE COMMUNITY

The philosophies of school boards may determine how much service beyond lunch and breakfast is provided by school foodservices. As schools are being used in many parts of the country for church on Sunday, adult education at night, and as a community center in between, the needs for additional services are growing.

Pre-school Programs and Day Care

Some school systems have programs extending from 6 a.m. to 8 p.m. or later, six to seven days a week. The growing number of working mothers has resulted in extended day cares, which pick up the children early and deliver them home late. Breakfast and lunch are available under the National School Lunch and Child Nutrition Programs, and under Day Care and Head Start Programs, snacks are reimbursable. The state school foodservice supervisor can provide information and answer questions regarding the availability of these programs.

Summer Feeding

Summer feeding is operated primarily in large cities; however, it is available nationwide. It is a needed program for areas where there is high unemployment and a large number of children who qualify for free and reduced-price meals. The reimbursement is usually adequate to cover costs and it provides summer employment for school foodservice staff.

Senior Citizens

Senior citizen programs will continue to grow as the population of those over 65 years of age increases. Schools are usually well equipped to handle the program in conjunction with the school programs. Schools usually can handle them more economically and are acquainted with meeting federal guidelines. Also, the income from programs like Senior Citizen Nutrition and Meals-on-Wheels can help offset rising labor costs. In 1986, school districts were encouraged to become more involved in these programs in legislation passed by Congress and signed by the President.

Under the Federal Senior Citizen Nutrition Program, breakfast and lunch are often served and are reimbursable. For information on these programs, contact the county or city social services department or write to:

Administration on Aging
U.S. Department of Health and Human Services
Washington, D.C. 20201

Emergency Feeding

The school is a natural center for taking care of groups in case of natural emergencies, such as major fires, floods, snowstorms, and tornadoes. Schools should be prepared for emergencies with a procedures manual and trained staff. Often the Red Cross works with the schools in such events. It isn't unusual for a large group of people to be housed at the local school when these emergencies happen. There is usually no time for planning and getting questions answered when this happens. Commodity foods and purchased foods that are used in emergency feeding must be replaced. The local Red Cross is the prime organization for coordinating efforts.

Banquets and Special Functions

It is important to have a school board policy regarding these special services. The functions should be related to school activities and should not compete with commercial foodservice operations. They should be fully self-supporting, including labor costs, etc. Any food used from the school foodservice inventory should be paid for, and USDA commodities have to be replaced if used.

Many school foodservices add a profit into their charges, which helps subsidize the school foodservice programs. Employees must be paid for the hours worked. As of April 1986, the labor laws have been interpreted to mean that all non-management school employees must be paid time-and-a-half for all hours worked over 40-hours per week. Volunteering is common; however, for liability insurance reasons and labor hours, it is not wise to permit school employees to work and not be on the payroll.

SCHOOL MANAGED OR MANAGEMENT CONTRACT

Most school districts manage their own school foodservices; however, management contractors have made some inroads into the school market. Nearly one-third of Pennsylvania's schools' food service is managed by contractors.

There are pros and cons to school managed and to management contractors managing the foodservices. If a school district has a well-run program, that operates within the budget and meets the needs of the students, it does not need the services of a management company. There are several different approaches to contracting with a management company: (1) management of the entire operation, (2) management of the foodservice at a fee, and (3) act as a caterer only.

The checklist (Illustration I.A) can be valuable to a director of foodservices, a principal, and business manager when preparing bid specifications and evaluating contracts presented. It is wise to get the answers to "who does what" and have all these type procedures in writing.

Usually the business manager makes the decision about which company to select. Since there are so many areas that should be considered, a committee made up of principals, a foodservice expert (who knows school foodservice), and a financial person, would be advisable. The decision should not be made totally on the financial arrangements.

Awarding a bid of this type is difficult because of the variables, particularly if the "low bidder" has to be given first priority. The steps to awarding this are:

1. Determine what problems the contractor is to remove that are causing the search for management outside.
2. Request for proposals should be sent out. Requests should be specific, otherwise, the responses may be so different it is impossible to compare proposals.
3. Evaluate proposals and determine which companies to request proposals from to manage operations for three years. Have a check list and rating system.
4. Evaluate finances with what is offered.
5. Make awards and continue evaluation committee.

Illustration I.A

COST RESPONSIBILITY CHECKLIST
CONTRACTED OPERATIONS/SCHOOL FOODSERVICES

FOOD	COMPANY	DISTRICT
Food Purchasing		
Processing of Invoices		
Payment of Invoices		
LABOR		
Payment of Regular Full-Time Wages		
Payroll Taxes		
Fringe Benefits and Insurance		
Preparation of Payroll		
Processing of Payroll		
Workers Compensation		
ADDITIONAL ITEMS		
China/silverware/glassware—Original Purchase to Inventory Level Required for Operation		
China/silverware/glassware—Replacement during Operation		
Telephone—Local		
Telephone—Long Distance		
Removal of Trash and Garbage from Kitchen		
Removal of Trash and Garbage from Premises		
Replacement of Expendable Equipment (pots, pans, etc.)		
Products of Public Liability Insurance		
Cost of Repairing Equipment		
SUPPLIES		
Detergent and Cleaning Supplies		
Paper Supplies		
Menu Paper		
Postage		

Taxes/Licenses	_____	_____
Pest Control	_____	_____
Laundry	_____	_____
Uniforms	_____	_____
Utilities	_____	_____
CLEANING		
Equipment and Hoods	_____	_____
Vent from Hoods to Outside	_____	_____
Floors	_____	_____
Walls	_____	_____
Ceiling and Fans	_____	_____
Light Fixtures	_____	_____
Tables and Chairs	_____	_____
Rest Rooms	_____	_____
ENERGY	_____	_____

*Source: Bureau of Budget and Management, Pennsylvania Department of Education.

SCHOOL MANAGED—CENTRALIZED OR DECENTRALIZED

Most school districts are centralized to some degree. However, some have school-by-school independence.

Should a principal need to know how to run a restaurant? That is about what a principal is doing at times when the school district is uncentralized. In addition, he/she has the worry of audits of the program's accountability and of compliance with the nutritional requirements of the school foodservice programs. On the other hand, that principal has complete say over menus, what food is purchased, and who is hired.

Some principals seem to have the time and want to run their total program, including school foodservices. Whereas, others find enough to do without the worries of school foodservices' meal pattern regulations, purchasing food, training of new employees, and determining if the menus are nutritious.

More and more school districts—county and city—have centralized the administration of school foodservice in recent years. There are numerous advantages, including:

1. Upgrade of management is possible. Someone more qualified can be hired to specialize in school foodservice. This is a very specialized area complicated with hundreds of federal, state, and local regulations.
2. Remove some of the problems of running the programs from the school principal.
3. All schools in areas can be more equal in quality service provided.
4. Increased buying power means better prices and service.
5. Eliminate duplication of efforts when there are several local schools purchasing as one, planning one menu, etc.
6. Training programs can be provided.
7. Centralized warehousing and distribution system may be justifiable.
8. Accounting reports and state reports can be done by someone who specializes in that.

The size of a centralized system may range from two schools to 575 schools in Los Angeles and 800 schools in New York City. Consolidation of the management can reduce administrative costs.

The items most frequently centralized are planning menus, purchasing, warehousing, fiscal control and accounting, action on free and reduced-price meal applications, verification, hiring of employees, and training. However, the advantages of centralization won't be realized if authority, as well as responsibility are not centralized.

CHAPTER II

FINANCIAL MANAGEMENT

The management of foodservices' finances has become more difficult in recent years as the funding has been cut and costs have steadily escalated. During the 1970s new funding was a yearly happening; whereas, the 1980s have been very uncertain and contained little more than "cost of living" increases. In some parts of the country, costs have increased faster than income has, resulting in a tighter financial situation.

The financial management of school foodservice funds is further complicated with a lot of federal and state accountability requirements. Most business managers will agree it is wise to set the school foodservice funds up in a separate bank account.

Monthly claim forms must be filed with the state agency, reporting the activity of the program in order to receive reimbursement for each student breakfast and lunch served. The forms required are:

1. *Participation*—number of breakfasts and lunches served for the month by the categories of free, reduced-price, and paid meals.
2. *Finances*—the beginning balance (cash), all cash income, expenditures, and the ending balance.

States differ with the additional information required. Some states monitor the cost of preparing a breakfast and a lunch. They may continue to require full-cost accounting. Since these requirements differ, it is wise to find out what the state requires.

REVENUE SOURCES

Federal Cash Reimbursement

The amount of reimbursement is determined each July by USDA by multiplying meals by the rate of reimbursement and is governed by federal law. The escalating clause in the law provides an automatic increase based on cost-of-living data. In recent years, it has increased an average of three to four percent yearly. Time is an important factor. In order to obtain the reimbursement on a timely basis, the monthly claim forms must be into the state office on a specific date. States vary with this requirement. Very late claims run the risk of no reimbursement. The state requirement should be checked.

Lunch Program cash reimbursement includes:

1. Lunch subsidy under Section 4 of National School Lunch Act for all lunches served to children.
2. Additional subsidy for free meals under Child Nutrition Act.
3. Additional subsidy for reduced-price meals under Child Nutrition Act.

Breakfast Program cash reimbursement includes:

1. Subsidy for the paying child's breakfast.

2. Subsidy for free and reduced-price breakfasts.
3. Additional funding for free and reduced-price breakfasts served in a school classified as "Severe Need."

State and Local Support

The state may provide a state reimbursement on all student lunches and/or breakfast, on just the free and/or the reduced-price, or use some other formula to meet the "matching" payment requirement of the federal law. Some states, such as Oklahoma, Louisiana, California, Utah, and Georgia, subsidize the Child Nutrition Program in addition to the required reimbursements. The state funds may be distributed monthly or in lump sums. Even the managers' salaries may be paid by the state, as in Louisiana.

Local support comes in many forms—cash reimbursement or by payment of certain costs, such as fringe benefits for the employees.

Income from Price Charged Students and Adults

The revenue from prices charged students and adults is determined locally. It is usually the difference between cost and revenue from these other sources. This is discussed further below.

Other Sources of Revenue

Many schools sell food a la carte at prices that will yield profits which help subsidize the lunch and breakfast programs. Special luncheons and dinners, catering to day cares, senior citizen nutrition programs, and other school districts, may provide additional revenue. Interest from the balances in the bank is a frequent source of revenue.

PRICING MEALS AND SERVICES

Price Structure of Meals

The prices charged students and adults for the complete lunch and breakfast meals and kindergarten snacks are usually established after reviewing the financial status and recommendations from the staff (see Illustration II.A). The meal prices may have to cover all or a part of food, labor, employee benefits, repairs, replacement of equipment, cleaning and paper supplies, telephone, travel for banking and training meetings, administrative, supervisory, and clerical salaries.

Meal prices for adults must cover the costs including labor costs of preparation and service. No financial assistance is received from the government or state for adult meals. USDA has fairly detailed instructions on determining the minimum charge to a non-program adult. The price charged should be at least the per meal cost of the lunch plus the per meal commodity entitlement, e.g., if the cost of producing a lunch is $1.40, the charge to adults would be $1.40 plus the commodity entitlement (12 cents per meal in 1986-87). Or, the price charged should be equal to the amount of federal reimbursement received for a free lunch (Sections 4 and 11) plus the commodity entitlement per meal. Some school districts have circumvented the regulation. State interpretation of this regulation should be checked.

Charging

Carrying credit for students and adults served is a state or local decision. However, federal and state auditors frown on charging. The USDA auditors believe

each school foodservice is on a cash and federal free/reduced-price meal basis. The accounting system has no provisions for handling charges. The procedure described below is used in one school district where no charging is allowed.

To ensure that students in elementary schools do not go without lunch when they lose, or through other circumstances do not have money, a procedure is set up for the school office to handle charges. The foodservice manager consults with the principal and establishes a system whereby the school foodservice can be reimbursed for meals served to students without money. This does not pertain to students who are authorized to receive free meals. In some cases, parent teacher associations provide the charge fund which is set up as a "revolving" fund.

In this, the foodservice manager issues a charge slip, which is to be signed by the student and the manager. Each day the manager exchanges the charge slips for cash from fund in the principal's office. This makes it possible for the manager to record the meal on the day it was served. Collections are completed through the principal's office. Charges are not allowed to accumulate. Some cases of repeated charges may be investigated by visiting teacher or another authorized person to establish the possible eligibility of the children for free or reduced-price meals.

Illustration II.A

SAN DIEGO CITY SCHOOLS
Foodservices Department
1986–87 MEAL PRICES

The 1986–87 meal and milk prices are:

STUDENTS	
Lunch	
Elementary Lunch	$ .80
Secondary Lunch	1.25
Reduced-Price Lunch	.25
Breakfast	
Elementary Breakfast	.45
Reduced-Price Breakfast	.25
Secondary Breakfast	.40
Milk	.25
ADULTS	
Lunch	
Adult Lunch without milk, without tax	$1.45
Breakfast	
Adult Elementary Breakfast without milk, without tax	.50
Adult Secondary Breakfast without milk, without tax	.45
Milk	
Adult milk, without tax	.25

FOR ADULT SERVICE

Lunch

Elementary schools and children's centers serve larger portions of the three following items: Vegetable, salad, fruit, or dessert. Secondary schools serve regular secondary lunch.

Free Meals for Adults

Foodservice employees are the *only* adults that are usually authorized to receive a meal free. However, some school districts do not provide even foodservice employees' meals free. All other adults, including instructional personnel, custodial personnel, and guests, should pay daily for meals and food received through the local foodservice operation, unless it is a fringe benefit paid for by the school budget. Adults may make payments in cash or purchase meal tickets. No charging for adult meals should be permitted.

HANDLING TICKETS, ROSTERS, AND CASH

Handling Tickets and Rosters

In addition to taking cash over the line at the time of service, most school districts use tickets or a roster system in order to have records of services to children who receive free and reduced-price lunches, and to allow for those who want to pay ahead for their meals.

A ticket system or "i.d." system is most frequently used with secondary students. The system used should protect the identity of those students receiving their meals free or at a reduced price. It should not be obvious as to who those students are, and the following should be remembered in developing a system:

1. Color, size, and general appearance of paid, free, and reduced-price tickets and i.d.'s should be the same as for those students paying. A code may be used to designate if paid, free, or reduced price.
2. All students should be treated equally.
3. The sale or distribution of tickets and i.d.'s should be handled the same for students receiving meals for free, reduced price, or at full price.

In order to protect the student transaction, some school districts require screens that shield the student at the cashier. Regardless of the methods used, the number of lunches or breakfasts served should be carefully accounted for as the students are being served. Since it must be determined if the student has a complete lunch or breakfast that meets the federal and state meal pattern requirements, the accounting for the meal should be done at the *end of service* using one of the following methods:

1. A multi-counter
2. Cash register or other electronic counter
3. Tally sheets/roster
4. Other (to be approved by the state)

The roster is successfully used in schools, particularly at the elementary level. A class list of students may be used, whereas, a student's meal can be coded as free, reduced, or paid. The words "free" or "reduced-price" should not appear on the roster. The paying child may pay by day, by week, by month, etc. The roster may become the "tally sheet."

Numbering System

A numbering system can work very effectively and speed up the serving lines in school districts where a large percentage of the students qualify for free or reduced-price meals. In this system, all students should be given an identification number (three or four digits) which can be coded to allow cashier to know who is receiving free or reduced-price meals. Some cash register systems have been programmed to accommodate the numbering system very effectively.

Handling Cash - Making Change

Two of the most basic principles involved in the transfer of money from one person to another are:

1. Never subtract the sale from a larger denomination bill; always give change to come up to the total of the money received.

   Example: A sale is made for 95¢ and a $5 bill is given the cashier. The correct procedure is to add the change back to the five dollars by counting one nickel and four $1 bills. It would be incorrect to subtract 95¢ from $5 because there is greater chance for error since this now requires a mental calculation without the use of an adding machine.
2. Always complete one transaction at a time to avoid becoming confused.

   Example: The same person who just handed you $5 for his or her 95¢ would also like change for a $10 bill. The correct response from the cashier should be (assuming the cashier can handle the second transaction), "I would be most happy to make change for your $10 bill, but first let me take care of your lunch."

Cash registers provide excellent accountability and save cashiers time. Cash registers will give correct change due; however, this process slows down the services. Pre-set key boards are available that carry the correct prices. At the end of the lunch periods, cashiers should remove the cash from the cash registers, count the money, complete an accountability form, and have it signed by a second person. The manager or designee should take the cash register reading. Cashiers should not be permitted to take their own readings.

Counting Money

Two or more people should count and roll money and prepare bank deposit. This aids in accuracy, decreases time spent in performing this task, and eliminates adverse criticism of the handling of funds. Check with the local bank to determine how they prefer the money be prepared for deposit. The following describes the usually accepted method of preparing money for a deposit.

Coins are usually wrapped in coin wrappers obtained from the bank and stamped with the name of the school. All bills should be placed face upward, banded, and marked with the amount in each packet. To ensure accuracy, each packet of bills should be checked by two people. Silver and currency that cannot be wrapped should be counted, inserted in an envelope, and marked accordingly.

Example:

Loose Coin		
11 @	$ .50	$ 5.50
9 @	.25	2.25
3 @	.10	.30
20 @	.05	1.00
13 @	.01	.13

Bills		
3 @	$10.00	$30.00
2 @	5.00	10.00
8 @	1.00	8.00

All currency should be banded within its own denomination. In other words, all $10 bills should be banded together, all $5 bills should be banded together, etc. This is done to expedite the counting of money when balancing the cash drawer, and it is much easier to re-check if there is an error. Also, money should be counted in a protected, preferably locked area, and precautions should be taken when transferring the deposit to the bank.

The deposit slips are usually prepared in triplicate. Erasures or strikeovers should not be permitted. If an error is made, a new deposit slip should be prepared. Record on the deposit slip the amount of cash, and list each check either by name or number and bank. The deposit slip should be initialed by person(s) preparing the deposit.

The three copies of the deposit slip are distributed as follows:

Original	Bank Teller
1 Copy (validated copy)	Accounting Office
1 Copy	Foodservice Manager

MAINTAINING RECORDS

Since federal and state funds are involved, audits may be done at any time. The General Accounting Office often audits these programs. The state agencies are required to carry out reviews and audits on the local programs. Because of staffing limitations of state offices, this may not be a yearly review.

All records pertaining to participation, financial information, and free and reduced-price meal applications should be kept on file for at least *three years* after the close of the fiscal year to which they pertain. This is a federal regulation. State and local regulations may require four or more years.

Participation and Revenue Records

Participation records include documentation to support the monthly claim reports. This is not a place for poor bookkeeping practices. Failure to maintain complete, detailed records can result in repayment for reimbursement claimed and received that cannot be substantiated with records. Basically that includes accounting for service and receipts:

Service

1. Daily number of lunches (by type) and breakfast served to children.
2. Daily number of lunches (by type) and breakfast served free or at reduced price.
3. Daily number of lunches served to adults.
4. Daily amounts of food prepared and served (Production records).

Receipts

1. From children's payments.
2. From federal reimbursement, including federal reimbursement under the Child Nutrition Act (Lunch and Breakfast Programs).

3. General Fund (subsidy).
4. Loans.
5. From all other sources (adults, banquets, etc.)

Use of Funds

There is basically one federal regulation to carry out in determining what the foodservice funds can be used for: "Revenue received by the non-profit school foodservice . . . shall be used only for the operation or improvement of such foodservice provided, however, that such revenues shall not be used to purchase land or buildings or to construct buildings." The state's interpretation of this regulation will be important to the local school district.

Expenditures must be supported with documentation, such as vendor invoices (signed), payroll records, and travel vouchers. The payroll records must include a time report signed by the employee. These areas of accountability include:

1. Program expenditures. Supported by invoices, receipts, time sheets, or other expenditure.
   A. For food.
   B. For labor.
   C. Repayment of loans or advances.
   D. All other cash expenditures.
2. Value of donations to program.
   A. Donated food, exclusive of foods donated by the U.S. Department of Agriculture.
   B. Donated services.
   C. All donations other than food and services.
3. Personnel or labor costs
   A. Time sheets and payroll
   B. Data—some required by law; some by contracts.

BUDGETS

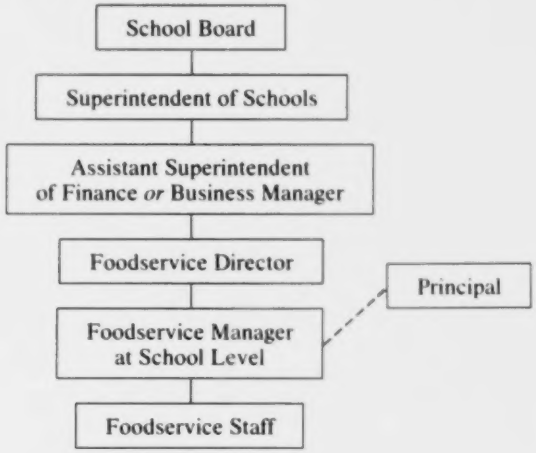
Unlike other budgets in the school system, the foodservices budget is *not* based on preset cash. There are probably few items in the foodservice budget that can be set and have a "cap" on the amount to be spent. For example, the food costs are directly related to the number served. If the participation is up five percent, the income should be up and in turn the cost of food should be up. Labor in some school districts is directly related to the number of meals served currently. In this case, the labor costs would differ from what is in the budget if the participation is up five percent. Some school districts preset the labor at the beginning of the school year for the year, regardless of decreases or increases in number served. In this case, the dollars may be basically preset and easy to estimate for budget purposes.

Some argue what is the use of establishing a budget when one does not know the revenue that will be available, nor many of the expenditures. Budgets do set goals and guidelines. It will probably be necessary to update the budget several times during the year, based upon actual operating results. The first review of the budget should take place by the end of November; whereas, if the expenditures are over in an area, correction can be made.

CHAPTER III

PERSONNEL

The foodservice operation, when centralized, is usually under the superintendent's direction, or his/her designee, a director or supervisor of foodservices. It is important to determine the line of authority and determine who is responsible for what. The organization chart below is used to illustrate the line of authority or chain of command in a typical school district:



When the district is not centralized, the manager's supervisor is usually the principal. In the case of a management company, the manager may be employed by the management company and answers to that company. This should be clearly understood.

POSITIONS JOB DESCRIPTIONS, RESPONSIBILITIES AND QUALIFICATIONS

FOODSERVICE DIRECTORS/ADMINISTRATORS
District/State Levels

Definition:

A person who plans, organizes, directs, administers and evaluates a school food service and/or nutrition education program for a school district or multiple units

including state educational agency. Basic responsibilities include program planning, personnel management, program review and evaluation resource allocation and financial management, facilities planning, organizing and implementing a program of nutrition education, and establishing a program of marketing and communications.

Job Functions

A. Establishes a procedure for developing, implementing, and evaluating goals and objectives for the school food and nutrition programs.
B. Establishes the organizational framework for achieving program goals and objectives.
C. Administers and directs the implementation of school nutrition programs within a school district or state in compliance with federal, state, and local regulations.
D. Interprets school food service and nutrition education program needs to federal, state and local policy makers.
E. Implements the appropriate use of information systems in the management of child nutrition programs.
F. Establishes program standards and directs implementation to ensure operation of a nutritionally sound school nutrition program.
G. Evaluates each school food service unit to determine its effectiveness in achieving program goals and compliance with local, state and federal policies, rules and regulations.
H. Plans for the development, coordination, and implementation of nutrition education as part of the school nutrition program.
I. Establishes and implements budgeting and financial management systems consistent with local, state, and federal requirements.
J. Establishes a comprehensive program for personnel management in cooperation with managers; administrators, and other appropriate personnel.
K. Develops an effective system to include monitoring for quality food production and service or if state personnel, provides technical assistance.
L. Establishes a system for the procurement and distribution of food and nonfood materials or if state personnel, provides technical assistance.
M. Determines facility needs and schedules replacement equipment or if state personnel, provides technical assistance.
N. Implements sanitation standards and devises a system including training for proper handling of all food products or if state personnel, provides technical assistance.
O. Implements standards and controls for safety in food service facility design or if state personnel, provides technical assistance.
P. Establishes a school nutrition program marketing system for the district or if state personnel, provides technical assistance.
Q. Establishes effective working relationships with appropriate members of all departments in the school district or state agency as appropriate.
R. Develops and maintains an effective communication and public relations program.
S. Implements research and development plans.
T. Implements a program for continuous self-development and professional growth.

Supervision and Evaluation

Superintendent or designee

Qualifications

All levels: Two years child nutrition experience

Level I Associate Degree*
12 Semester hours formal training

Level II Baccalaureate Degree*
15 Semester hours formal training

Level III Master's Degree*
18 Semester Hours formal training

Level IV Doctorate Degree*
24 Semester Hours formal training

*Food and Nutrition
Dietetics
Food Systems Management
Business Administration
Home Economics
Education Administration
Related area

Continuing education: 60 hours every 3 years

FOODSERVICE SUPERVISOR/SPECIALIST
District/State levels

Definition:

A person who coordinates and evaluates nutrition activities in more than one school within a school system or state agency or develops, coordinates and evaluates specialized programs such as nutritional aspects, facilities procurement, nutrition education, staff development.

Job Functions:

A. Assists in implementation of program goals and objectives by providing technical assistance to unit managers and staff and school systems, if state agency.
B. Nutrition Education
   1. Works with instructional staff in developing and evaluating nutrition education within the established curriculum.
   2. Provides for and shows how the school food service program is used as a laboratory for nutrition education.
   3. Serves as a member of the health education development team.
C. Staff Development
   1. Assists in developing and implementing a plan for professional growth and certification for the food service staff providing appropriate inservice training.
   2. Assists with implementing departmental personnel in cooperation with personnel department.

3. Implements staffing formula and performance standards for all personnel.
4. Assists manager in determining staff requirements for each building/cost center.
5. Establishes procedures for orientation, including implementation
6. Interprets personnel policies and procedures to unit managers.
7. Supervises and/or assists in the implementation of accurate accumulation of personnel data.
8. Implements and/or assists in implementing a procedure for evaluation and review of all food service employees incorporating a process for professional growth and correction of unacceptable job performance.

D. Procurement
1. Implements and executes the food service purchasing system developed by the director.
2. Develops specifications for food and supplies according to municipal, state, and federal regulations.
3. Designs measures for sampling and evaluating food products.
4. Processes and recommends purchase of all food and supplies to the director and/or purchasing agent.

State Agency personnel would provide technical assistance for above.

E. Facilities; Safety and Sanitation
1. Recommends the space utilization requirements for a food service facility in accordance with food production system.
2. Assists in planning the physical layout in food service facilities.
3. Determines specifications for the purchase of equipment.
4. Provides for equipment maintenance and repair.
5. Identifies a need for the remodeling of facilities.
6. Determines the need for and establishes an equipment replacement schedule.
7. Complies with federal (OSHA), state, and local safety regulations.
8. Establishes safety standards for individual school food service units.
9. Implements an ongoing training program to keep staff constantly aware of all safety rules, regulations, and first aid procedures.
10. Implements an accident reporting system.
11. Implements emergency procedures for staff to follow when accidents occur.
12. Complies with state sanitation standards as applied to equipment and facilities.
13. Facilitates the development of basic procedures, including a schedule to be followed in cleaning and sanitizing equipment and work areas.
14. Maintains an effective insect and rodent control program for the district.
15. Establishes a refuse collection procedure.

State Agency personnel would provide technical assistance for above.

Supervision and Evaluation

Directly responsible to the Director, Administrator, Superintendent or Designee

Qualifications

All levels: One year child nutrition experience.

Level I High School Diploma or GED
9 Semester hours or 150 course hours of formal training

Level II	Associate Degree or 60 Semester hours from a college or university 12 Semester hours of formal training
Level III	Baccalaureate Degree* 15 Semester hours
Level IV	Master's Degree* 18 Semester hours

*Food and Nutrition
Dietetics
Food Systems Management
Business Administration
Home Economics
Education Administration
Related area

Continuing education requirements: 45 hours every 3 years

FOODSERVICE MANAGER
School or Unit

Definition:

A person who has the overall supervisory responsibility of a school food service operation. Basic responsibilities include the supervision of a staff of employees and the implementation and coordination of food services to ensure high standards of nutrition and nutrition education, food production, and student service.

Job Functions:

A. Implements planned quality menus incorporating time-saving production techniques, effective merchandising, and nutrition education activities.
B. Assumes responsibility for receiving, storing, handling, preparing, and serving of food according to established standards.
C. Assures that sanitation and safety practices in all phases of the school fund service operation meet established standards.
D. Maintains a required system of accountability.
E. Plans schedules and work assignments. Trains, supervises, and evaluates food service staff according to established procedures.
F. Promotes student and staff satisfaction by merchandising and serving meals in an attractive manner.
G. Involves students, staff and community in school food service activities.
H. Communicates concerns to appropriate supervisor about policies and procedures relating to all food service employees.
I. Directs preparing and serving of meals for special functions and community activities.
J. Implements a professional growth plan.
K. Manages the program in accordance with federal, state, and local requirements.

Supervision and Evaluations

Supervisor/Director/Administrator

American School Food Service Association Requirements:

All levels: One year child nutrition experience.

Level I Completion of 10th grade
70 hours formal training
10 hours Sanitation/Safety
20 hours Technical
20 hours Management
20 hours Electives

Level II High School Diploma or GED
110 hours formal training
10 hours Sanitation/Safety
30 hours Technical
40 hours Management
30 hours Electives

Level III Associate Degree or 60 semester hours from a College or University
150 hours formal training
10 hours Sanitation/Safety
40 hours Technical
40 hours Management
60 hours Electives

Level IV Baccalaureate Degree
190 hours formal training
10 hours Sanitation/Safety
40 hours Technical
50 hours Management
90 hours Electives

Continuing education: 30 hours every three years

TECHNICAL ASSISTANT
School or Unit

Definitions:

A skilled person who, under the supervision of a food service manager, performs assigned tasks in designated areas.

Job Functions:

A. Attends job-related training classes and workshops.
B. Practices procedures in food preparation, use and care of equipment and personal habits to assure that sanitation standards are met.
C. Follows standards of safety in preparing, storing, and serving food.
D. Follows the manager's instructions in producing and serving food.
E. Follows manager's instructions in portioning, garnishing, and serving meals.
F. Participates in implementing promotion of special school and community activities consistent with board policy.
G. Maintains required forms and records as assigned by manager.
H. Follows procedures in personnel matters.
I. Demonstrates the ability to work with the school community.

J. Participates in implementing cost containment measures while maintaining quality.

Supervision and Evaluation

Food Service Manager

American School Food Service Association Requirements:

All levels: One year child nutrition experience.

Level I — Completion of eighth grade
30 hours formal training
- 10 hours Sanitation/Safety
- 10 hours Technical
- 10 hours Electives

Level II — Completion of eighth grade
60 hours formal training
- 10 hours Sanitation/Safety
- 20 hours Technical
- 30 hours Electives

Level III — High School Diploma or GED
100 hours formal training
- 10 hours Sanitation/Safety
- 40 hours Technical
- 20 hours Management
- 30 hours Electives

Level IV — High School Diploma or GED
140 hours formal training
- 10 hours Sanitation/Safety
- 40 hours Technical
- 40 hours Management
- 50 hours Electives

Continuing education: 15 hours every three years

GENERAL ASSISTANT
School or Unit

Definition:

A person who performs assigned tasks in designated areas. May be responsible to a manager or in a large institution, to a technical assistant.

Job Functions:

A. Attends job-related training classes and workshops.
B. Practices procedures in use and care of equipment, and personal habits to assure that sanitation standards are met.
C. Follows standards of safety in storing and servir g food.
D. Follows manager's instructions in portioning, ga nishing, and serving meals.
E. Assists in maintaining daily required forms.
F. Assists with food production.

G. Follows procedures in established personnel matters.
H. Participates in school community activities.
I. Participates in implementing cost containment measures while maintaining quality.

Supervision and Evaluation

Food Service Manager

American School Food Service Association Certification Requirements:

All levels: One year child nutrition experience.

Level I — Completion of eighth grade
10 hours formal training
10 hours Sanitation/Safety

Level II — Completion of eighth grade
30 hours formal training
10 hours Sanitation/Safety
20 hours Electives

Level III — High School Diploma or GED
60 hours formal training
10 hours Sanitation/Safety
30 hours Technical
20 hours Elective

Level IV — High School Diploma or GED
90 hours formal training
10 hours Sanitation/Safety
40 hours Technical
40 hours Electives

Continuing education: 15 hours every three years

EMPLOYMENT PRACTICES AND PROCEDURES

Since the employment practices related to one group influence other groups, it is important to note these policies are provided here as a sample only. It is strongly suggested that they be used only after careful scrutiny to determine impact on a local school district. The following section is taken from the Fairfax County (VA) Public Schools *Food Service Manual* (1985) with their permission.

Vacancies

When a vacancy occurs, the manager should notify the appropriate person in personnel with request for replacement with the specific hours of work, date needed, and any specific requirements of the position.

Interviewing is an area where complaints of discriminatory practices often have occurred. It is hard to carry on an interview that could not be grounds for complaint. Interviewers should be aware that even if the information received during the interview is not used for hiring decision, the questions may have the unlawful effects of discouraging protected groups (elderly, minorities, and women) from making application.

FRINGE BENEFITS

Foodservice employees may or may not be provided the same benefits as other employees in the school district. The fringe benefit policy for foodservice should cover sick leave, holiday, retirement benefits, and workmen's compensation. In order for the foodservice operation to present a professional appearance to the customer, it may be desirable for the school district to provide an allowance for purchasing or provide uniforms for foodservice employees.

Lunch as a Fringe Benefit

Will lunch be a benefit or will the employee have to pay? Is the lunch break on the employer's or employee's time? The following break policy has been adopted by another district:

> Food Services Department employee's scheduled lunch periods and rest breaks are determined by district policy, Food Services departmental policy, and the collective negotiations contract with the district.
>
> The lunch period is unpaid time. It is the practice and prerogative of the district Food Services Department to schedule thirty (30) minute unpaid lunch periods for foodservices employees. Lunch is provided. The unpaid lunch periods are duty free and the employee is free to leave the work location during the lunch period.
>
> The break period is paid time. Employees working regularly scheduled assignments with paid time *more* than three and one-half (3) hours daily are assigned one fifteen minute break approximately midway through the work period. Employees working paid time for seven (7) hours or *more* are assigned two fifteen minute breaks, one approximately midway through the work period preceding the lunch period, one approximately midway succeeding the lunch period.
>
> Food Services Department employee lunch periods and rest breaks can be summarized as follows:
>
> 7-8 hour workers—15 minute break, 30 minute lunch, 15 minute break.
>
> 4-6½ hour workers—15 minute break, 30 minute lunch *OR* 30 minute lunch, 15 minute break (break period is scheduled in the before-lunch work period or after-lunch work period, whichever is most appropriate).
>
> 2-3 hour workers—30 minute lunch.
>
> Break times and lunch times shall be determined by the supervisor. Those short-hour employees who are scheduled unpaid lunch periods at the beginning or the end of their scheduled work day may choose to forego same. Employees, however, shall not be permitted to shorten their workday by foregoing rest breaks and/or lunch periods scheduled within the workday. Food of any kind *must not be taken from the cafeteria.*

Sick Leave

Sick leave is usually earned based on amount of time the person works. Since many foodservice employees work less than an eight-hour day, it is necessary to describe what a "day of sick leave" is. It includes the number of hours the employee is usually scheduled to work (daily scheduled hours).

Since many districts do not provide foodservice employees with annual vacation days, a portion of the sick days often are used for personal leave. If personal leave

is not used, the days would be accumulated as sick leave; whereas, sick leave may not be planned, the use of personal leave can be. Usually, it is required that the employee's immediate supervisor approve personal leave.

Sick leave policy should be established and in writing. It may include when an employee can use sick leave, such as, (1) when an employee is incapacitated by illness or injury; (2) for medical, dental, or optical appointments; (3) for necessary medical care; (4) for death of a member of the immediate family (immediate family includes father, mother, brother, sister, husband, wife, child, mother-in-law, father-in-law, son-in-law, daughter-in-law, foster parent, brother-in-law, sister-in-law, foster child, stepparent, stepchild, grandparent, grandchild, or member of one's own household regardless of relationship); and (5) for exposure to a contagious disease when attendance would jeopardize the health of others.

An employee may be required to provide a medical statement when it is thought advisable. For example, a medical statement may be requested if the employee is absent in excess of two work days. False or fraudulent use of sick leave may be grounds for disciplinary action.

Policy should be established about such things as (1) will sick leave benefits be paid to an employee upon termination and (2) can sick leave be used to obtain additional retirement credit.

Retirement Plan

Will foodservice employees be provided a retirement plan? How many hours a day must they work to qualify? How much does the employee contribute? Will the employer pay a designated percentage?

EMPLOYMENT PHYSICALS

It is wise to require all new or re-hired foodservice employees to have a physical examination. It is desirable to have the school system's doctor or the county health department perform the physical. This may help reduce health insurance premiums as well as workmen's compensation cost.

A tuberculin test or a chest X-ray should be required in accordance with the local health department's policy.

ABSENCES

Foodservice employees who expect to be absent should notify their immediate supervisors as far in advance as possible. Such notification should be given on each day of absence, unless other specific arrangements have been made. If a staff employee expects to be absent, he or she should notify the manager; if a manager expects to be absent, he or she should notify the principal and foodservice supervisor.

SALARY PLAN AND SCALE

Each school district should have uniform salary schedules for all foodservice employees in the district. It is recommended that the salary schedule allow for the size of the operation as well as the length of service when managers are involved. The managers' salary schedule may also give credit for the educational level attained. Other foodservice employees' salary schedule should probably be based on length of service.

Will foodservice employees be paid an annual salary or on an hourly rate? Managers are usually on duty from 6 to 8 hours a day. It is often customary that

the employee receives a step increase upon receipt of a satisfactory evaluation, until a longevity step or the top step of the scale is reached. A sample pay scale is provided in Illustration III.A.

STAFFING AND CLASSIFICATION

Staffing Formula

The following staffing formula taken from the *Mississippi Child Nutrition Program Manual* is offered as a guide in determining the amount of labor needed in a school foodservice operation. In order to determine the number of meals served, breakfasts and a la carte sales are converted to equivalent lunches in the following example:

Meals served daily:

Breakfast	200 ÷ 2	=	100 meals
Lunch	500	=	500 meals
			600 meal equivalents daily

An accepted standard for a full-production kitchen is 12-15 meals per labor hour. Higher productivity can be expected from experienced personnel or when convenience foods (pre-prepared) are used.

Meals Served With Total Labor Hours, Including Manager

Number of Meals	Low Productivity (12 meals/labor hour)	High Productivity (15 meals/labor hour)
200	16½ hours	13 hours
300	25 hours	20 hours
400	33 hours	27 hours
500	42 hours	33 hours
600	50 hours	40 hours
700	58 hours	47 hours
800	67 hours	53 hours

When determining the number of labor hours to staff an operation, there are some variables which should be considered:

(1) Size (volume) of operation,
(2) Number of serving lines,
(3) Scheduling of lunch period,
(4) Type of dishware (permanent vs. disposable dishes),
(5) Duties of the manager (is manager also bookkeeper?),
(6) Experience and training of staff,
(7) Number of menu choices,
(8) Convenience foods used, and,
(9) Type equipment and physical layout.

When evaluating the labor hours in a foodservice operation, if it is determined to be overstaffed, there are two alternatives: (a) increase participation or (b) reduce staff. With a conscious and concerted effort toward improving performance, increased

Illustration III.A

PRINCE WILLIAM COUNTY
SCHOOL FOOD SERVICE
1984–1985

GRADE		Hourly Rates A	B	C	D	E	F	G	H	I	J
*G-13	Manager IV	6.34	6.64	6.96	7.29	7.63	7.99	8.37	8.77	9.19	9.63
	Managers of schools staffed with 60 or more hours.										
*G-11	Manager III	5.78	6.05	6.34	6.64	6.96	7.29	7.63	7.99	8.37	8.77
	Managers of schools staffed with 40–59 hours.										
*G-9	Manager II	5.27	5.52	5.78	6.05	6.34	6.64	6.96	7.29	7.63	7.99
	Managers of schools staffed with 10–39 hours.										
*G-8	Manager I	5.03	5.27	5.52	5.78	6.05	6.34	6.64	6.96	7.29	7.63
	Managers of schools staffed with less than 10 hours and Assistant Managers.										
G-7	Cook/Baker	5.04	5.28	5.53	5.80	6.07	6.35	6.66	6.97	7.31	7.65
G-6	Cafeteria Worker	4.81	5.04	5.28	5.53	5.80	6.07	6.35	6.66	6.97	7.31

*Positions include the benefit of fully paid membership in V.S.R.S.
Manager IV, III and II contracted for 7 hours per day for 190 days.
Manager I contracted for 6 hours per day for 190 days.
Assistant Managers contracted for 6 hours per day for two days in excess of the number of school days.
Cook/Bakers and Cafeteria Workers contracted for 3, 4, 5, or 6 hours per day for two days in excess of the number of school days.
Courtesy of Prince William County (VA) School Food Services.

efficiency is usually possible. If the alternative chosen is to increase participation, consider the following suggestions provided by the *Mississippi Child Nutrition Program Manual*.

(1) Increase the number of choices available to students. This may be done by using a wider variety of main dishes or perhaps by providing a salad bar for the students.
(2) Increase length of time available for students to eat. Sometimes students are moved in and out of the dining areas without sufficient time to relax and eat with their peers. The students may have to make the choice of either not eating or bringing something from home to eat quickly in order to make time for pleasure.
(3) Provide more points of service by setting up additional lines, mini-snack bars or milk bars.
(4) Adjust menu to provide very popular menus more often.
(5) Implement offer vs. served provision, which may also help better satisfy the students.

Classification of Foodservice Managers

The pay of a manager will probably be based on the complexity of the job. The following classifications of foodservice managers/assistant managers are used by Fairfax County (VA) Public Schools. Please note an "Equivalent Meals" has been used in this classification, which means breakfast, a la carte, and other services are considered along with lunches. Parts of the classification are shown below.

Elementary/Intermediate Schools:

Level I	500* and under	F-9	
Level II	501 to 700	F-11	6 1/2 hours per day
Level III	701 to 900	F-13	
Level IV	901 and up	F-15	

*Schools serving under 300 are satellited.

High/Secondary Schools:

Level I	1,000 and under	F-15	(7 hours per day)
Level II	1,001-2,000	F-17	(7 hours per day)
Level III	2,001-3,000	F-18	(7 hours per day)
Level IV	3,001-up	F-18	(8 hours per day)

The formula for determining average daily number of lunches and equivalent lunches includes the following:

Number of regular lunches per day
+ .26 × average daily number of breakfasts
+ Number of daily adult lunches, including staff
+ Average daily a la carte revenue x .416
+ Number of lunches satellited daily
+ Number of daily day care lunches
+ Number of daily senior nutrition lunches

In Fairfax County (VA) Schools, the classification of managers is realigned yearly under the following time frame:

1. By April 1, the Office of Food Services determines and supplies to the Office of Employment Services a list showing the average number of lunches and equivalent lunches served by each school. The average will be based on participation during the months of September, October, November, December, January, and February of the current school year.
2. Based on the data obtained above from Office of Food Service, together with consideration of any boundary or other changes significantly affecting participation, the personnel coordinator will assign cafeteria manager positions to their appropriate grades for the following year.
3. There will be no grade changes upward or downward during the school year based on month-to-month variations in the number of pattern lunches and equivalent lunches served.
4. However, adjustments in the grades of foodservice manager positions will be made during the school year when warranted to account for significant changes in the scope of managers' responsibilities, e.g., losses or gains in participation due to transporting food. Adjustments will also be made to correct any inequities which may occur as a result of the step outlined above in paragraph 1.
5. An employee who has been reclassified downward will have his or her salary maintained for one year unless the correct salary rate and step exceeds his or her "redline" salary during that year.

Destaffing

State laws and collective bargaining agreement should be carefully reviewed before taking any type of action. A destaffing procedure is needed, particularly in school districts where decreased enrollments can be expected in years to come. Otherwise, it may be impossible to maintain an established productivity rate. The following guidelines may be followed when a reduction in employees or hours of employment is necessary in foodservices.

1. The foodservice manager and foodservice supervisor determine needs for program staffing, and number of hours for full-time staff and part-time staff so as not to exceed total hours of labor prescribed for the operation.
2. When the staff exceeds what is prescribed, employees may be asked to voluntarily request transfers and fill vacancies in other schools.
3. Where the number of employees on a staff is to remain the same but a reduction of hours is necessary, go first for volunteers to take a reduction in hours. Offer transfers to protect number of hours the employee works, if vacancies are available.
4. Where arbitrary decisions are required to reduce the total number of employees on the staff or to reduce the work hours for one or more employees, the individual with the least seniority on the staff is usually the one to leave or have hours reduced. Seniority is defined as the employee's length of continuous service, within the foodservice area, as determined by personnel records. The exception to this would be made if the employee with least seniority would be the only one capable of doing or willing to do a particular assignment, such as cashiering or main dish preparation.

Evaluations

All foodservice employees should be evaluated annually on their anniversary dates (usually the month which they began employment), or other designated

times. The persons doing the evaluation—manager for staff, principal and/or food-service supervisor for manager should review the evaluation with the employee and have him or her sign the evaluation form. The employee's signature does not imply agreement with the evaluation, but indicates the employee has seen it. The manager should advise all new employees of how and on what factors they will be evaluated. In order to do this a copy of the employee evaluation form *should be posted*. Sample manager and staff employee evaluation forms are provided in Illustration III.B and III.C.

DISCIPLINARY ACTIONS

Disciplinary action should be handled fairly and in accordance with school board policy or in accordance with collective bargaining. Procedures are necessary to avoid legal action. If there are no established procedures, those listed below may be used as a guide.

Informal, oral disciplining is recommended before formal approach in writing. The employee should be given an opportunity to improve. However, when improvement does not come about, it may be necessary to let an employee go. Prior to the dismissal of a foodservice employee, the following steps should be taken:

1. The employee, whose work is less than satisfactory, should be evaluated on a continuing basis and written records kept. These should include formal evaluations, summaries of conferences, logs of events, etc.
2. Conferences should be held with the employee with notations of how his or her work may be improved. A written summary of the conference given to the employee is recommended and helpful.
3. If the employee's work continues to be below the level expected, or violation of rules continues, the employee, if he or she has more than one year of service, is warned of possibilities of probation. If the employee is in his or her first year of employment, he or she is in a probationary status and should be reminded of this. This warning or reminder should be in writing.
4. The problems of the employee should be discussed with the immediate supervisor and help provided the staff person in the form of training, etc.
5. If desired improvement does not occur, the employee is placed on probation and is given a letter stating the length of probation (often 90 days), specific weaknesses, and suggestions for improvement.
6. The employee should be evaluated prior to the end of probationary period. The manager and/or principal will make a recommendation to the office of personnel. A decision must then be made by personnel as to whether the employee should be retained or dismissed.

Unsatisfactory Service Separation

Reasons for unsatisfactory service separation may include the following:

1. Incompetency
   a. Failure to follow instructions or perform duties necessary to efficient operation of the school feeding program.
   b. Failure to work well with other people and be a constructive team member.
   c. Failure to receive satisfactory evaluation.
   d. Discourtesy to the public (students, faculty, etc.).

Illustration III.B

FAIRFAX COUNTY PUBLIC SCHOOLS

FOOD SERVICE MANAGER AND ASSISTANT MANAGER EVALUATION

DIRECTIONS: Place the column's value in the appropriate rating block. 4 - Superior; 3 - Above Average; 2 - Average or Satisfactory; 1 - Needs Improvement; 0 - Unsatisfactory
The performance rating should be returned to Personnel Services no later than _____

Employee's Name _____

Social Security Number _____

Job Title _____

School/Department _____

Type of Evaluation: _____

Anniversary Date: _____
Period of This Review:

From _____ To _____

PERFORMANCE FACTORS	SCORE	COMMENTS BY PRINCIPAL	COMMENTS BY MGR./COORDINATOR
A. Performance of Duties			
1. Maintains acceptable quality of work			
2. Maintains acceptable quantity of work			
3. Keeps principal and food service coordinator informed			
4. Adapts to emergencies and new situations			
5. Carries out instructions, rules, and regulations			
6. Maintains good food quality and merchandising			
7. Handles customer related problems diplomatically			
8. Orders, stores, and inventories food and supplies efficiently			
9. Carries out sound financial management practices			
10. Ensures good sanitation, security and safety practices			
11. Ensures proper use of equipment and other resources			

Illustration III.B cont.

B. Supervisory Ability			
1. Organizes and schedules work			
2. Trains and instructs staff			
3. Deals with staff fairly and impartially			
C. Personal Qualities			
1. Maintains satisfactory attendance record			
2. Demonstrates dependability and responsibility			
3. Displays appropriate appearance and grooming			
4. Accepts and acts upon constructive criticism			
5. Uses sound judgment			
6. Interacts with customers in a pleasant and efficient manner			
7. Conveys positive attitude			

Total ÷21 = ☐ OVERALL PERFORMANCE

☐ I recommend reappointment. ☐ I do not recommend reappointment.

☐ I recommend reappointment, but am placing the employee on probation for a period of _____
I have advised the employee in writing and forwarded a copy to the Department of Personnel Services.

_____
Signature of Principal Date

It is understood that by signing this form, the employee acknowledges having seen and discussed the report. The employee's signature does not necessarily imply agreement with the conclusions of the supervisor(s). If desired, the employee may attach a written statement.

_____
Signature of Area Food Services Coordinator (or Manager if Assistant Food Service Manager evaluation) Date

_____
Signature of Employee Date

RETURN TO DEPARTMENT OF PERSONNEL SERVICES

Courtesy of Fairfax County (VA) Public Schools

Illustration III.B cont.

INSTRUCTIONS

The employee should be rated by the manager on each of the 18 performance factors on a scale of 0 to 4 according to the key at the top of the form. Total all ratings and divide by 18 to determine overall performance. Carry the numerical rating two decimal places, rounding to the nearest tenth.

In order to receive any increment for which the employee may be eligible, the employee must attain an overall performance rating of greater than 2.0 (2.1 or higher). A rating of less than 2.0 requires the employee to be placed on probation or in case of a first year employee may result in recommendation for dismissal. A letter should be given to the employee describing deficient areas and recommendations for improvement whenever overall performance is below 2.0 (satisfactory).

It is recommended that the comments section be used to describe strong and weak points of the employee in each of the three major areas: performance of duties, interpersonal relationships, and personal qualities.

The principal at the employee's work location signs as the reviewing authority. If changes are made by the principal, they should be noted in the comments area.

The form should be completed and signed by both the manager and the principal prior to the evaluation conference and before obtaining signature of the employee.

Illustration III.C

FAIRFAX COUNTY PUBLIC SCHOOLS
FOOD SERVICE STAFF EMPLOYEE EVALUATION

DIRECTIONS: Place the column's value in the appropriate rating block. 4 - Superior; 3 - Above Average; 2 - Average or Satisfactory; 1 - Needs Improvement; 0 - Unsatisfactory.
The performance rating should be returned to Personnel Services no later than _____

Employee's Name _____

Social Security Number _____

Job Title _____

School/Department _____

Type of Evaluation: _____

Anniversary Date _____
Period of This Review:

From _____ To _____

PERFORMANCE FACTORS	SCORE	COMMENTS BY MANAGER	COMMENTS BY PRINCIPAL
A. Performance of Duties			
1. Maintains acceptable quality of work			
2. Maintains acceptable quantity of work			
3. Follows directions			
4. Performs additional assignments willingly			
5. Shows initiative			
6. Implements sanitary practices			
7. Utilizes available equipment and resources			

Illustration III.C cont.

B. Interpersonal Relationships			
1. Seeks and accepts guidance			
2. Works as a team member			
3. Gets along well with fellow workers			
4. Supports the food service program			
5. Communicates positively with customers			
C. Personal Qualities			
1. Maintains satisfactory attendance record			
2. Demonstrates dependability and responsibility			
3. Displays appropriate appearance and grooming			
4. Accepts and acts upon constructive criticism			
5. Uses sound judgement			
6. Interacts with customers in a pleasant and efficient manner			

Total ÷ 18 = ☐ OVERALL PERFORMANCE RATING

☐ I recommend reappointment. ☐ I do not recommend reappointment.

☐ I recommend reappointment, but am placing the employee on probation for a period of _____
I have advised the employee in writing and forwarded a copy to the Department of Personnel Services.

_____
Signature of Manager Date

Reviewed By:

_____
(Principal at Employee's Work Location) Date

It is understood that by signing this form, the employee acknowledges having seen and discussed the report. The employee's signature does not necessarily imply agreement with the conclusions of the supervisor(s). If desired, the employee may attach a written statement.

_____
Signature of Employee Date

RETURN TO DEPARTMENT OF PERSONNEL SERVICES

Courtesy of Fairfax County (VA) Public Schools

INSTRUCTIONS

Rate the employee on each of the 21 performance factors on a scale of 0 to 4 according to the key at the top of the form. Total all ratings and divide by 21 to determine overall performance rating. Carry the numerical rating two decimal places, rounding to the nearest tenth.

In order to receive any increment for which the employee may be eligible, the employee must attain an overall performance rating of greater than 2.0 (2.1 or higher). A rating of less than 2.0 requires the employee to be placed on probation or in the case of a first year employee may result in recommendation for dismissal. A letter should be given to the employee describing deficient areas and recommendations for improvement whenever overall performance is below 2.0 (satisfactory).

It is recommended that the comments section be used to describe strong and weak points of the employee in each of the three major areas: performance of duties, supervisory ability, and personal qualities.

The principal should evaluate the food service manager; however, the principal must consult with the food service coordinator for comments and obtain his or her signature. If the principal and coordinator cannot agree, the principal's evaluation will prevail; however, the coordinator may attach a statement to the evaluation.

The food service manager should evaluate the assistant food service manager; however, the manager must consult with the principal for comments and obtain his or her signature (for assistant food service manager at satellites, the principal of the satellite is the principal to be consulted).

The evaluation form should be completed and signed by the principal and coordinator/manager prior to the evaluation conference and before obtaining signature of the employee.

2. Insubordination, willful refusal to comply with the proper order of an authorized supervisor.
3. Theft or destruction of school property.
4. Falsification of records, including falsification of application papers and claim for travel reimbursement.
5. Habitual tardiness, unauthorized or excessive absences, or abuse of sick leave.
6. Use of intoxicants or drugs, or disorderly conduct while on duty.
7. Conviction of a crime.

Resignation

Notice of resignation should be given at least ten working days prior to the last day of work. This notice should be required in writing. The notice should include date submitted, reason for resignation, and effective date of resignation.

An employee who resigns without sufficient notice should have it noted on his or her personnel record "Quit without Notice" or "Quit with Insufficient Notice," and then may not be eligible for reinstatement unless a review of the circumstances leading to the separation justifies reinstatement in good standing.

Grievance Procedure

A formal procedure for handling complaints of foodservice employees should be established. Every effort should be made on the part of foodservice employees and administrators to utilize the procedure in resolving problems of foodservice employees on the job. A grievance is a difference or a dispute between a non-supervisory employee and the supervisor with respect to the carrying out of policies, rules, and regulations as they affect the work activity of the employee.

Grievances should be processed as rapidly as possible, the time limits on each level to be considered the maximum. Every effort should be made to resolve the grievance at the lowest possible level. The grievant should have the right to have his/her council representative accompany him/her at any level of the procedure. All proceedings should be kept confidential.

CHAPTER IV

PRODUCTION AND SERVICE

The production of food includes planning, which is a very important part. With the school lunch and breakfast programs, it is important that the person in charge of the planning, production, and service is fully acquainted with the breakfast and lunch meal patterns and the related federal regulations.

TYPE OF PRODUCTION

On-Site Production

The most common system of preparing food is referred to as "on-site production." It is usually the most expensive, too, unless volume is substantial and/or the labor costs are low. However, for many schools, it may be the only feasible way.

Satelliting

When a school district consists of more than one school, one of the alternatives to on-site production should be considered. One school kitchen can prepare part or all of the food for another school to finish off and serve. In some school districts, a central kitchen prepares food for several schools. It is referred to as "satelliting." Satelliting can be done several ways: (1) transporting the food in "bulk" (ready for serving on site), (2) transporting food pre-plated and ready to serve, and (3) transporting food ready for finishing off and serving. In the case of ready to serve food, hot food is kept hot from the oven to service in special "heated carriers" and cold food is kept cold with ice or in cold carriers.

The bulk method of transporting prepared food, though it can reduce costs, will still require labor at both locations; whereas, preplated food, "ready to serve," can be served with only one person and in a few hours. For more details on pros and cons of each system and equipment necessary, see *School Foodservice* (AVI Publishing Company).

Use of Convenience Foods

Convenience foods have improved greatly in recent years and are used by more and more foodservices, even some of the more expensive restaurants. When a production kitchen begins using convenience foods, the productivity rate should be increased by reducing labor hours. Convenience foods are pre-prepared foods and have "labor" in them; therefore, they are often more expensive than the fresh or "from scratch" products. However, that is not always true, since many factors may affect costs of fresh or raw products.

As foodservices costs go up and factories become more efficient (with automation), the finished product may be more cost effective when made with convenience foods versus made from fresh product or "from scratch." USDA commodities

have done much toward maintaining the traditional way of preparing food from scratch. Most of the commodities are made available in natural form, e.g., whole turkeys. In such locations where "from scratch" production is being done, foodservices are using a very large percentage of their income for labor costs. This leaves less money for food than would be the case where convenience foods are used. However, USDA commodities are the mainstay for many.

Commodity Processing

The commodity processing contracts have been successfully used by many school districts to convert raw products to a more accepted, versatile product, e.g., whole turkey into turkey ham, hot dogs, bologna, salami, etc. Customizing of foods is more expensive than buying product from the commercial market. See Chapter I for additional discussion of processing contracts. The state food distribution agency can provide information on companies with processing contracts.

MENU PLANNING

Planning menus is the most essential, controlling procedure that a manager does. Menus control what is purchased, equipment needed, labor needs, student acceptability, and employee schedules. Also, many federal regulations are involved. *The Menu Planning Guide* and *Food Buying Guide* contain the guidance needed. These guides can be obtained from the state department of education and are essential in assuring federal regulations are being followed.

The following system for menu planning is taken from the *Oklahoma Handbook for Child Nutrition Programs*.

Menus can be planned more easily and efficiently when a systematic method is followed. Systematic planning requires that you organize:

1. *The Place:* Have a special place at school—a well-arranged office or a quiet corner in the kitchen or dining area. Equip the space with a desk or a table, a chair, a bulletin board, and a file cabinet or a bookcase or a built-in shelf for reference materials and recipes.
2. *The Reference Materials:* Materials and special aids should be arranged in an orderly manner. These would include previous menus, food inventories of both USDA donated foods and purchased foods, price lists, menu suggestions, the *Menu Planning Guide* and *Food Buying Guide* by USDA, and menu planning forms readily available.
3. *The Menu Cycle:* Determine the period of time for which menus will be planned. Plan for a minimum of two weeks. A cycle of from five to six weeks is recommended. (This will be discussed in more detail in the following pages.) Select a time for planning when free from interruption. Allow time for study and review of inventories, purchasing practices and delivery schedules, prices, previous menus, menu suggestions, and recipes. Allow time to determine quantities of foods needed and to prepare market orders.
4. *The Method of Planning:* Good menu planning goes beyond the listing of specific foods to be included in daily lunches. Make a practice of doing a complete job.
   a. Plan the menus on a form designed for this purpose.

b. Select specific recipes to be used and record the number. (All recipes should be standardized.)
c. Determine the size of the portion or serving needed.
d. Estimate the number of lunches to be prepared.
e. Adjust the recipes to provide the necessary number of portions. (Use the Recipe Adjusting Charts.)
f. Calculate the amounts of food required for the total number of meals to be served to both children and adults. (Use the quantities charts or *Food Buying Guide*.)
g. Evaluate the menus from the standpoint of quality and quantity.
h. Estimate the cost of the lunches planned.
i. Prepare market orders as needed.
j. Develop time and work schedules.

CAREFUL SYSTEMATIC PLANNING OF MENUS, WELL IN ADVANCE, IS THE KEY TO GOOD MENUS.

School Lunch Pattern

The *Menu Planning Guide for Food Service*, published by USDA, Food and Nutrition Services, is an excellent guide to use. It covers the school lunch pattern and menu planning thoroughly.

The nutritional goal for school lunches is to provide approximately one-third of the Recommended Dietary Allowances (RDA), as specified by the National Research Council for children of various ages. The school lunch pattern (see Illustration IV.A) provides a framework for planning nutritionally adequate school lunches.

The National School Lunch Program regulations specify that a school lunch must contain four main components in order to receive reimbursement. The four components are: (1) meat/meat alternate, (2) vegetable and/or fruit, (3) bread/bread alternate, and (4) milk. However, a minimum of five menu items must be planned, as two vegetable/fruit components are required. See the Meal Pattern in Illustration IV.A for portion sizes and descriptions of what makes a serving.

To help assure that all school lunches meet the nutritional goal, the following recommendations have been suggested:

a. A choice of foods should be offered;
b. The amount of fats, salt, and sugar in the lunch should be kept at a minimum;
c. A Vitamin A vegetable or fruit should be served at least twice a week;
d. A Vitamin C fruit or vegetable should be served several times a week;
e. Several foods rich in iron should be served each day.

A sample set of menus is shown in Illustration IV.B, courtesy of Wake County (NC) Public Schools.

In order to help assure the menus are meeting the meal requirement, the food-service supervisor will want to provide menu instructions when menus are planned centrally. These instructions help communicate the intent of the planner to the user. The manager will need to provide instructions to help his/her staff. See Illustration IV.C for a sample menu instruction form.

Offer Versus Served

The regulation which allows students to choose less than all of the food items within the lunch pattern is known as "offer vs. serve." Public Law 94-105 requires

Illustration IV.A

SCHOOL LUNCH PATTERNS FOR VARIOUS AGE/GRADE GROUPS

U.S. Department of Agriculture, National School Lunch Program

USDA recommends, but does not require, that you adjust portions by age/grade group to better meet the food and nutritional needs of children according to their age. If you adjust portions, Groups I-IV are minimum requirements for the age/grade groups specified. If you do not adjust portions, the Group IV portions are the portions to serve all children.

COMPONENTS		MINIMUM QUANTITIES				RECOMMENDED QUANTITIES*	SPECIFIC REQUIREMENTS
		Preschool		Grades K-3	Grades 4-12*	Grades 7-12	
	A serving of one of the following or a combination to give an equivalent quantity:	ages 1-3 (Group I)	ages 3-4 (Group II)	ages 5-6 (Group III)	ages 7 & over (Group IV)	ages 11 & over (Group V)	
MEAT OR MEAT ALTERNATE*	Lean meat, poultry, or fish (edible portion as served)	1 oz	1½ oz	1½ oz	2 oz	3 oz	• Must be served in the main dish or the main dish and one other menu item. • Vegetable protein products, cheese alternate products, and enriched macaroni with fortified protein may be used to meet part of the meat/meat alternate requirement. Fact sheets on each of these alternate foods give detailed instructions for use.
	Cheese	1 oz	1½ oz	1½ oz	2 oz	3 oz	
	Large egg(s)	½	¾	¾	1	1½	
	Cooked dry beans or peas	¼ cup	⅜ cup	⅜ cup	½ cup	¾ cup	
	Peanut butter	2 Tbsp	3 Tbsp	3 Tbsp	4 Tbsp	6 Tbsp	
VEGETABLE AND/OR FRUIT	Two or more servings of vegetable or fruit or both to total	½ cup	½ cup	½ cup	¾ cup	¾ cup	• No more than one half of the total requirement may be met with full strength fruit or vegetable juice. • Cooked dry beans or peas may be used as a meat alternate or as a vegetable but not as both in the same meal.
BREAD OR BREAD ALTERNATE	Servings of bread or bread alternate A serving is: • 1 slice of whole-grain or enriched bread • A whole-grain or enriched biscuit, roll, muffin, etc. • ½ cup of cooked whole-grain or enriched rice, macaroni, noodles, whole-grain or enriched pasta products, or other cereal grains such as bulgur or corn grits • A combination of any of the above	5 per week	8 per week	8 per week	8 per week	10 per week	• At least ½ serving of bread or an equivalent quantity of bread alternate for Group I, and 1 serving for Groups II-V, must be served daily. • Enriched macaroni with fortified protein may be used as a meat alternate or as a bread alternate but not as both in the same meal. NOTE: *Food Buying Guide for Child Nutrition Programs*, PA 1331 (FNS) provides the information for the minimum weight of a serving.
MILK	A serving of fluid milk	¾ cup (6 fl oz)	¾ cup (6 fl oz)	½ pint (8 fl oz)	½ pint (8 fl oz)	½ pint (8 fl oz)	At least one of the following forms of milk must be offered: ** A • Unflavored low-fat milk • Unflavored skim milk • Unflavored buttermilk NOTE: This requirement does not prohibit offering other milks, such as whole milk or flavored milk, along with one or more of the above.

*Group IV is highlighted because it is the one meal pattern which will satisfy all requirements if no portion size adjustments are made.

*Group V specifies recommended, not required, quantities for students 11 years and older. These students may request smaller portions, but not smaller than those specified in Group IV.

* Amended to include seeds.

** Amended by Public Law 99-661 to add whole milk as a student choice. Regulations for implementing will be issued in 1987.

Illustration IV.B

WAKE COUNTY PUBLIC SCHOOLS MENUS...

B: Breakfast
L: Lunch

WHICH COMES FIRST..... APRIL 1996 THE CHICKEN OR THE EGG?

Monday	Tuesday	Wednesday	Thursday	Friday
B: Waffle w/Syrup 7 Chilled Juice Milk L: Sausage Pizza or Grilled Cheese Sandwich Seasoned Green Beans Fruit Cocktail Milk	B: Coffee Cake 8 Apple Juice Milk L: Cheeseburger on Bun or Chicken Nuggets w/Roll Shredded Lettuce Dill Chips Buttered Potatoes Milk	B: School Baked Muffin 9 Grape Juice Milk L: Spaghetti w/Roll or Chef's Salad w/Roll or Crackers Tossed Salad (Choice of Dressings) Fresh Fruit - Milk	B: Toast w/Jelly 10 Grits Chilled Juice - Milk L: Super Taco or Hot Ham/Cheese Sandwich Lettuce & Tomato Buttered Corn Milk	B: Ham/Cheese Biscuit 11 Chilled Peaches Milk L: Hot Dog on Bun w/Chili or Quiche w/Roll Crunchy Cole Slaw Crispy French Fries Milk
B: Doughnut 14 Chilled Juice Milk L: Cheeseburger on Bun or Corn Dog Mixed Vegetables Chilled Sliced Peaches Milk	B: Sausage Biscuit 15 Orange Juice Milk L: Vegetable Beef Soup Peanut Butter and Jelly Sandwich or Chicken Fillet on Bun Fresh Apple Milk	B: Cinnamon Toast 16 Applesauce Milk L: Lasagna w/Roll or Barbecue on Bun Spinach Salad Chilled Applesauce Milk	B: Fruit Danish 17 Chilled Juice - Milk BIRTHDAY LUNCH L: Fried Chicken w/Roll or Submarine Sandwich Sweet Potato Souffle Green Peas Birthday Cake Milk	B: Grilled Cheese 18 Assorted Fruits Milk L: Fishburger or Ravioli w/Roll Shredded Lettuce Pineapple Chunks Milk
B: Waffle w/Syrup 21 Chilled Juice Milk L: Sausage Pizza or Tuna Salad w/Roll or Crackers Tossed Salad (Choice of Dressings) Orange Wedges - Milk	B: Pineapple 22 Breakfast Bread Apple Juice - Milk L: Ham Biscuit w/Macaroni & Cheese or Fish 'N Biscuit Broccoli Spears Fruit Gelatin Milk	B: Raisin Biscuit 23 Chilled Applesauce Milk L: Taco Salad or Turkey & Bacon Club Sandwich Lettuce & Tomato Buttered Corn Milk	B: Cinnamon Bread 24 Chilled Juice Milk L: Baked Chicken w/Roll or Beef-A-Roni w/Roll Seasoned Green Beans Chilled Sliced Peaches Milk	B: Cheesy Eggs/Toast 25 Orange Juice Milk L: Hot Dog on Bun w/Chili or Manager's Choice Baked Beans Crunchy Cole Slaw Milk
B: Cereal 28 Juice Milk L: Chicken Fillet on Bun or Ham & Cheese Casserole w/Roll Buttered Peas & Carrots Fresh Apple Milk	B: Breakfast Buffet 29 Milk L: Spaghetti w/Roll or Manager's Choice Tossed Salad (Choice of Dressings) Chilled Diced Pears Milk	B: Breakfast Buffet 30 Milk L: Vegetable Beef Soup Grilled Cheese Sandwich or Hamburger on Bun Fresh Fruit Milk		

NOTE: EACH DAY IN THE WAKE COUNTY SCHOOLS THERE ARE CHOICES AVAILABLE AT BREAKFAST AND LUNCH THAT ALLOW STUDENTS WHO DO NOT EAT PORK PRODUCTS OR MEAT OF ANY KIND TO HAVE A WELL BALANCED MEAL.

Courtesy of Wake County (NC) Public Schools

Illustration IV.C Menu Instruction, Copiague County, NY

NO. MEALS	Breakfast	Lunch
Anticipated		
Actual Served		

Day _____ Date _____

Item	Portion Size	Amount Prepared	Amount Used	Left Over	Preparation Instructions
BREAKFAST					
LUNCH					

that senior high school students be offered all five food items of the school lunch. Students must choose at least three of these items for their lunch to qualify as a reimbursable meal. This law has reduced plate waste in many school districts. Local School Food Authorities may also permit students in junior high, middle schools or elementary schools to carry out "offer versus served." The offer vs. serve provision applied only to the lunch program until 1987 when Public Law 99-661 extended the provision to the school breakfast program. Regulations for implementing the law were not issued until mid 1987.

As stated above, a combination of any three or four foods will be considered a reimbursable lunch. It is required that the whole lunch—*all five foods*—be offered

to *all* students. To comply with the Federal regulations the following must be followed:

1. The complete school lunch must be planned and offered to students. It must consist of at least the following five food components:
   a. Meat or meat alternate
   b. Vegetable or fruit #1
   c. Vegetable or fruit #2
   d. Bread or bread alternate
   e. One-half pint milk

Other foods, such as dessert, may be added. However, the "offer" requirements apply to the basic five food items.

2. The student must take at least three of the five food components for it to be considered a "reimbursable lunch." If the student takes only two food components, the lunch is not reimbursable and the student should be charged a la carte prices.
3. In counting the number of food items taken, a double serving of an item does not count as two food items. Thus, if you give a student two servings of french fries, that is only one food component.
4. Three a la carte items which are not part of a planned lunch cannot be combined to make a reimbursable lunch.

Breakfast Meal Pattern

The School Breakfast Program meal pattern is very simple to follow, as shown below:

Breakfast Meal Requirements

Components	Minimum Required Quantities
Fruit or Vegetable	
Fruit or Vegetable or Fruit Juice or Vegetable Juice	½ cup
Bread or Bread Alternate	
One of the following or combination to give an equivalent quantity	1 serving

- A serving (1 slice) of whole wheator enriched bread
- A serving of biscuits, rolls, muffins, etc., whole-grain or enriched
- A serving (3/4 cup or 1 ounce, whichever is less) of whole-grain or enriched fortified cereal

Fluid Milk	
As a beverage *or* on cereal *or* both	½ pint

A protein-rich food should be offered to improve as often as possible. Illustration IV.D shows some typical breakfast menus.

Illustration IV.D

Plan for a variety in protein-rich foods.

SAMPLE BREAKFAST MENUS

MONDAY	
Orange Juice	½ cup
Oven Fried French Toast with Honey or Syrup	1 slice
Milk	½ pint
TUESDAY	
Tomato Juice	½ cup
Scrambled Egg	1 egg
Toast	1 slice
Milk	½ pint
WEDNESDAY	
Grapefruit Sections	½ cup
Oatmeal	⅛ cup
Bread	½ slice
Milk	½ pint
THURSDAY	
Orange Juice	½ cup
Hard Cooked Egg	½ egg
Crisp Bacon	1 slice
Toast	1 slice
Milk	½ pint
FRIDAY	
Sliced Banana in Orange Juice	½ cup
Ready-to-eat Cereal	¾ cup
Milk	½ cup

MONDAY	
Orange Juice	½ cup
Steamed Rice	½ cup
Toast	1 slice
Milk	½ pint
TUESDAY	
Applesauce	½ cup
Scrambled Egg	1 egg
Raisin Batter Bread	1 slice
Milk	½ pint
WEDNESDAY	
Orange Juice	½ cup
Caramel Peanut Butter Roll	1 roll
Milk	½ pint
THURSDAY	
Raw Apple Wedges (small apple)	½ cup
Drop Biscuits	1–2
Peanut Butter Honey Spread	2 Tbsp.
Milk	½ pint
FRIDAY	
Stewed Raisins/Orange Juice	¼ cup each
Peanut Butter Sandwich	2 Tbsp. P.B. 1 slice bread
Milk	½ pint

Courtesy of Oklahoma State Department of Education, School Lunch Section.

PRODUCTION RECORDS

A production record of the food served to meet the school lunch meal pattern is a desirable management tool and is required by some school districts and by some states.

A good production record documents the menu and the quantities of foods prepared and served. Basic information for a production record should contain:

1. Date and menus,
2. Name of food prepared (recipe number),
3. Number of portions planned,
4. Number portions prepared,
5. Number portions actually served,
6. Quantity of food used,
7. Quantity of food left over,
8. Weather conditions and special school events, and
9. Date and day of the week.

When production records are used to their full advantage, food waste can be kept to a minimum. See sample form in Illustration IV.E.

Illustration IV.E

SAMPLE FOOD PRODUCTION RECORD

Date _____
Day _____
Month _____

Menu Item	Portion Size	# of Portions Forecast	# of Portions Prepared	Quantity Food Used*	Portions		Cost/Serving	Total Cost
					Leftover	Served		

Comments and Special Instructions _____

_____

_____

_____

_____

As Purchased

Courtesy of Michigan Dept. of Education

CHAPTER V

PURCHASING, STORAGE, AND INVENTORY CONTROL

There are five documents related to purchasing for school foodservices that are recommended. They may be obtained free or at a nominal fee through the state Child Nutrition supervisor. They are: *Food Buying Guide for School Food Service*, *Purchasing, Volume I: Catalog of Specifications*, and *Purchasing, Volume II: Contract Purchasing*, and *Storage and Care*. The latter two are available upon request from USDA, Food Distribution Division, Food and Nutrition Service, 3101 Park Center Drive, Alexandria, VA 22302.

The fourth set of documents is Federal Specifications which are listed in the Federal Supply Catalog (FSC) Group 89, Subsistence. It may be obtained by writing: Deputy Administrator for Food Services, Food Safety and Quality Service (FSQS), U.S. Department of Agriculture, Washington, DC 20250.

PURCHASING

The Office of Management and Budget in 1979 established procurement standards for the purchasing of food, supplies, and equipment for the Child Nutrition Programs. (See Appendix II for the procurement standards in full.)

The major provisions of the standards are:

- Each School Food Authority is to maintain a code of conduct to govern the performance of its officers, employees, or agents in contracting for payment and expending program funds. This means that neither the officers, employees, nor agents will accept any gratuities, favors, or anything of monetary value from contractors or potential contractors. These codes of conduct carry penalties, sanctions, or disciplinary actions for those who violate the code.
- Each School Food Authority is to establish written procurement procedures which comply with the procurement standards. This will include a system for contract administration to assure contractor's compliance.
- All procurement transactions are to be conducted in such a way as to provide for maximum open and free competition.
- School Food Authorities are to avoid purchasing unnecessary or duplicative items.
- Invitations for bids must be based on a clear and accurate description of the material, product, or services to be procured. "Brand name or equal" may be used, but the features of the brand name must be specified. This means that food specifications should be included in the invitations for bid.
- Positive efforts should be made to utilize small businesses and minority owned businesses.

Illustration V.A*

HOW FOOD DOLLARS ARE SPENT

How food dollar is spent in one large school district (included are USDA commodities)

*Sample from one large school district, with USDA commodities included.

- SFAs can not use "cost-plus-a-percentage-of-cost" or "cost-plus-a-percentage-of-income" methods of contracting.

Even a small school district can usually reduce food costs by using bid buying, comparing prices, and being under a bid contract. Usually as much as 50 percent of the foodservice income is used for purchase of food and supplies. See Illustration V.A, which shows how the food dollar is spent in one school district.

Bid Buying

If a school system is about to begin the bidding process, it may be wise to bid a few food products (categories such as milk and dairy products) and gradually bid others. Identify the ten to twenty most used food items or categories. Those foods will generally account for two-thirds or more (generally 75-85%) of the total food dollar (see Illustration V.A). Focus on developing specifications of these foods.

Well-written specifications can lower food cost, while poorly written or nonexistent specifications can raise food cost. The advantages of specifications are that they can keep everything on a comparable basis, can help assure the buyer gets what is wanted, and are the desired way of communicating with the seller. A sample invitation to bid with specifications is in Appendix III.

There are several types of purchasing contracts, including: (1) fixed costs, (2) variable cost, (3) formula pricing, and (4) fee for service. The *fixed cost* can best be used for one year or less. Better prices are obtained in some cases with short-term contracts. Products that fluctuate in price on the market are probably best bid on a *formula pricing* basis, e.g., produce. For more on the subject, refer to the

Technical Assistance Manual Series, *Purchasing, Volume II: Contract Purchasing* (see page 00 for source).

The steps to good purchasing practices are:

1. *Good, detailed specifications* that describe what the purchaser wants.
2. *Evaluation of the products bid* by the vendors to determine if they are equal or better than the product specified, and that they meet the needs of the school foodservice.
3. *Award to the lowest bidder* that meets specifications.
4. *Check in the products delivered* to determine that they *are* the products bid by the successful bidder.

When developing specifications, one may want to use some of the specifications developed by the federal government. They will require tailoring to fit particular needs. Federal specifications have the advantages of: (1) widely used and known; (2) adequately describing the product so that the buyer and seller will know what is to be delivered; and (3) an acceptance procedure through the USDA Commodity Inspection Service helps assure compliance with the specifications. The biggest disadvantages are that they may not precisely describe the product needed and they are rather lengthy.

Collective Purchasing

When volume is small, buying power can be greatly enhanced by collectively purchasing. The prices are better and some vendors who would not be interested otherwise, will find it worth taking the time to submit a bid. School districts in Michigan, Montana, and Colorado, as well as others, have saved as much as 40 percent over what they previously paid by collectively purchasing.

It is suggested that a group start with a few districts and with staples, canned, and packaged foods. Add to them as the problems are worked out. A "code of ethics" that the group will abide by should be developed.

SPECIFICATIONS

Specifications are a list of descriptive terms that identify the characteristics desired in a product (see Illustration V.B). The description should use terms that will be understandable by the buyer and potential sellers.

Many distributors have packers to pack under their labels. This makes it harder to determine what grades are being bid and what is being delivered. Some of the major buying group labels and their designations are shown in Illustration V.C.

When preparing a specification be sure it is enforceable, is tailored to meet menu requirements, and the language used is understandable, clear and simple, but sufficiently precise, and that the product is commercially available. Also, include in the condition statement, as part of the specifications, how the product is to be delivered (refrigerated truck, etc.), when (how often, hour of day), and minimum size order that vendor is expected to deliver.

To be included in the information and agreement are:

1. quantity needed per delivery, number of delivery sites and locations
2. period of time, length of contract
3. conditions for payment, discounts
4. frequency of deliveries—daily? weekly?
5. where to be delivered to—inside the door, dock, in refrigerator
6. time of delivery—morning, afternoon, etc.

Illustration V.B

WHAT SHOULD SPECIFICATIONS INCLUDE?

ITEM NAME: Common name, type of product. Use an official "Standard of Identity" when available.

GRADE: Quality of official grade desired - federal and/or state licensed graders determine quality and grades. The U.S. Department of Agriculture grades many commonly used foods, except seafood, which is graded by the National Marine Fisheries Service of the U.S. Department of Commerce. Brand name or "equal" designation may be used to describe quality. However, the products bid as equals will have to be evaluated to determine if they are equals.

DESCRIPTIVE COMMENTS: Cut, style, variety, where grown. Class may refer to sex of animal, i.e., in cattle class refers to heifer, steer, bull, or cow. Kind may refer to such foods as flour, i.e., all-purpose, whole-grain, soft-white, etc. Variety may be as in apples (Delicious, Jonathan, Winesap, etc.) and green peppers (California Wonder, etc.) Style generally refers to how a product is processed, i.e., canned green beans may be cut, whole, or french style. Origin may be of importance, i.e., where product was produced, such as "western potato."

PACKAGING: Size, weight, measure, type of packaging such as paper, glass, can, paper between layers, etc. Weight may include number of pounds per piece and/or case. Number per container (oranges, 100s means 100 per box), can sizes (#303, #2 ½, #10), and count (e.g. with frankfurters, 8 per pound) should be stated.

CONDITION ON RECEIPT: Frozen, chilled, room temperature, etc.

LABELING REQUIRED: FNS, IMPS, nutritional, etc. Child Nutrition (CN) label may be required on some meat and meat alternate items.

ADDITIONAL REQUIREMENTS: Special instructions, i.e., on processed canned foods, and this year's pack may be required.

---

7. how bid will be awarded
8. conditions for adjusting and canceling orders due to changes in school schedule or other emergencies
9. penalty if contract is not complied with.

There are many things to consider when making a purchasing decision. It should not be on "low bid price" totally. See Illustration V.D for some areas to be considered.

Student acceptability may be a major criteria. One of the best ways to obtain student opinion is through taste testing. Illustration V.E is a form used by one school district when taste testing with students and a taste panel of supervisory people. It is a more sophisticated evaluation and would be particularly appropriate with a foodservice group.

The prices charged a school district by a distributor are influenced by four main factors: (a) product cost delivered to the distributor's warehouse, (b) cost of delivery to the school's or district's warehouse, (c) competition and desirability of getting the contract, and (d) how much it costs the distributor to do business with the school district.

The schools and/or school district can reduce their costs by reducing the cost to a distributor to do business with them. Gifts, samples, and redeemable stamps

Illustration V.C Grade designations

CHART OF GRADE DESIGNATIONS OFFERED BY MAJOR BUYING GROUPS

Buying Group	1st Quality	2nd Quality	3rd Quality
Nugget	Nugget — BLACK	Nugget — RED	Nugget — GREEN
PLEE-ZING	PLEE-ZING	LITTLE MOMMIE	PARTAKE
Pocahontas Foods USA Distributor	Pocahontas	Mount Stirling	Wigwam
S. E. RYKOFF & CO.	GOLDEN REY — Sexton — RED	SILVER REY — Sexton — BLUE	GLOWING STAR — Sexton — GREEN
SYSCO	STSCO Supreme - Gold Imperial - Blue Choice - Red	STSCO Reliance Green	VALUE LINE ____ BROWN
KRAFT FOODSERVICE	5 STAR BLUE	4 STAR RED	3 STAR GREEN
North American Foodservice	North American — BLUE	Host Delight — RED	Host Pak — GREEN

Illustration V.C, continued

CHART OF GRADE DESIGNATIONS OFFERED BY MAJOR BUYING GROUPS

Buying Group	1st Quality	2nd Quality	3rd Quality
All Kitchens.	All Kitchens. GREEN	All Kitchens. BLUE	Kitchen Value RED
CPS Continental	CPS Continental GOLD	CPS Continental RED	CPS Continental BLUE
Code	Code RED	Code BLUE	Code GREEN
FEDERATED	Red & White RED PARADE RED	Red & White BLUE PARADE BLUE	Red & White YELLOW PARADE YELLOW
FROSTY ACRES F.A.B. INC.	FROSTY ACRES	Garden Delight	— ——— —
Monarch	Monarch BLUE	Monarch RED	Monarch GREEN
Nifda	Nifda Prime Pak Royal-Pak Dandy-Pak BLUE	Chef Pac RED	Econo Pac GREEN

Illustration V.C, continued

CHART OF GRADE DESIGNATIONS OFFERED BY MAJOR BUYING GROUPS

Continued

Buying Group	1st Quality	2nd Quality	3rd Quality
PGR PACIFIC GAMBLE ROBINSON CO.	SNOBOY FROZEN; CANNED	GARDEN CANNED	— ——— —
LIL BRAVE	BLUE	RED	GREEN
BONDED	GOLDBON	— ——— —	— ——— —

NOTES

(a) 1st Quality: Packer Grade A for canned and frozen vegetables and frozen fruits. Packer Grade B (Choice) for canned fruits. Exception: Code Grade B fruits are packed under the 2nd Quality label.

(b) Frosty Acres French Fries: Color represents length of potato: Red = Premium Length (extra long); Brown = Long; Blue = Line Flow (variable lengths).

(c) North American Buying Group permits members to use their own "house" brands which may have different color or brand codes. House labels are packed under buying group contracts using the same quality standards.

(d) Lil Brave and Bonded: Logos not furnished.

(e) Sysco update: New corporate label program is being phased in as follows: Supreme Gold = Rare and unique products; Imperial Blue = Fancy vegetables and fancy and choice fruits from prime growing regions; Classic Red = Fancy vegetables and choice fruits from non-prime growing regions. Some Sysco and Buy Line labels will remain in the distribution system until supplies are exhausted.

(f) NIFDA update: Prime Pak = Fancy vegetables and choice fruits from prime growing regions; Royal Pak = Same as Prime Pak except from any region. NIFDA claims both will score 5 points higher than the minimum level for USDA Grade A. Dandy Pak = Fancy vegetables and choice fruits which meet USDA Grade Standards.

(g) Local companies are represented by various buying groups and will have their companies' private labels. Check with your distributor to verify house brand labels and quality.

Illustration V.D

SUMMARY OF FACTORS TO BE CONSIDERED IN PURCHASING DECISIONS

PRICE—Best responsive price in terms of quality and service.
—Not necessarily the lowest price.
—Requires a balancing of price against quality demanded and service required.

SOURCE—Supplier that can offer the best price in terms of quality/service/price.
—Judged by service provided against quality demanded and service required. Other considerations are product availability and additional costs incurred by the district (distribution and administrative costs).

QUANTITY—Function of order needs, storage capacity, and per unit cost.

PRODUCT—Measured by customer acceptability, storage capacity, product availability, preparation time, and cost.

TIME—Determined by ordering needs and product availability.
—Factors involved - safe stock levels, delivery lead time required, and market conditions (falling/rising prices).
—Timed to coincide with new season's pick (e.g. October/November for canned fruit and vegetables).

QUALITY—Grade, cut or sieve differences.
—Matching best balance of quality and price.

SOURCE: U.S. DEPARTMENT OF AGRICULTURE

---

or coupons, and meals out that some buyers expect, cost the distributor and those costs are passed on in the price bid. One school district requires their distributor to call each school's foodservice manager for their orders. This takes one company clerk almost full-time since it is a large school district; whereas, another school district of similar size collects all orders centrally and hands them to the distributor sorted by area weekly. This reduces the cost of doing business. Volume is a factor not only from how big the bid is, but also the size of each delivery.

Can Cuttings are one way of determining which brands meet specifications. However, the foodservice director should limit the quantity of food requested of a distributor to test. It can be very expensive. Illustration V.E, Foodservices Product Sensory Evaluation, can be used when testing products.

Standards of Identity

Standards of Identity and Standards are official descriptions of processed food products. The standards specify and limit the ingredients used in the product, describes how the product is fabricated and provides a physical description of the product. The U.S. Department of Agriculture (USDA) is responsible for meat and poultry standards. The Food and Drug Administration (FDA) is responsible for all other Standards of Identity. USDA calls them Standards and the FDA refers to them as Standards of Identity.

The Standard may be used when writing specifications, e.g. beef frankfurters - the Standard ensures the product is made from beef and does not include variety meats, extenders, or other non-meat additives other than spice, seasonings, and

Illustration V.E

SAN DIEGO CITY SCHOOLS
Food Services Department

FOOD SERVICES PRODUCT SENSORY EVALUATION

Date _____

Product _____

Name _____

Check Appropriate Box:

☐ Student

☐ Adult

Sample	Appearance	Flavor	Texture	Total Score	Acceptable? Yes or No	Comments
A						
B						
C						
D						
E						
F						

Rating Scale

Unacceptable	0	Good	3
Poor	1	Very Good	4
Fair	2	Excellent	5

THIS PRODUCT WILL BE JUDGED ON THE TOTAL SCORE.

AMB:fk
4-9-82 #257

authorized preservatives. It must contain less than 30% fat and have no more than 10% water added. The product described is of relatively high quality if it is labeled in a federally inspected plant.

Standards of Identities may be obtained by writing to:

Superintendent of Documents
U.S. Government Printing Office
Washington, D.C. 20402

Child Nutrition Label

The Child Nutrition label on a product designates what the product contributes to the meal pattern. This label is applied to products checked by the Food and Nutrition Service of USDA. The label states the weight of volume of a portion, the contribution it makes toward the meal requirement, and the date the product was approved. Some inspections of processing plants are done by the quality inspectors of USDA, and there is some assurance that the product does contain what the label states that it contains.

PROCESSING USDA COMMODITIES

With labor costs increasing yearly, it is not always a savings to make food from scratch, even when the main ingredients are donated foods. The Director of Foodservices for Dayton (OH) Schools said they could not afford to cut USDA donated butter. It costs less for the school district to buy pre-cut margarine and refuse the free butter.

Many school districts have had commodity foods processed into a finished product that they can better use. A good example of this is the whole turkey, which has very limited use when received at the school level. Through state commodity processing contracts, many school districts have had whole turkeys processed into turkey roast and roll, turkey hot dogs, ham, bologna, salami, and pot pies. There is a processing charge and in some cases it is very high.

The largest quantity processed product is pizza, which is a favorite of the students. The dairy products, cheese, butter, and dry milk, have been declared bonus commodities and appear to be around for a few years to come.

The National Commodity Processing (NCP) contract can be used on a number of products; however, it is limited to those containing dairy products. Many states are not actively involved in processing and the NCP contract gives the schools in those states the opportunity to purchase products at a reduced cost.

Many of the states, as well as the NCP, require a Child Nutrition (CN) label.

RECEIVING AND STORAGE

Checking In Deliveries

It is important when food and supplies are delivered that they are checked in properly. Before signing the bill:

- Determine if the products meet specifications, if the quantity ordered has been received, and if the prices charged are correct.
- With a wide-tipped magic marker, date each case. Stock should be dated when placed in storage to ensure rotation of item. The policy recommended is to use "first in first."

Proper Storage of Foods

Proper storage of food will help maintain quality and nutritive value, help keep it safe, wholesome, and appetizing. Storage area should be adjacent to the kitchen area and convenient to the receiving area. All storage areas should be lockable, and the keys should be restricted to the limited designated foodservice person(s).

There are two USDA publications from the Technical Assistance Manual Series, that are quite detailed on caring for food products and are available free (or at a nominal fee):

Volume III: Food Facts
Volume V: Storage and Care of Food Products

One should check with the state child nutrition supervisor for a free copy. Copies may also be obtained through the Food Distribution Division, Food and Nutrition Service, 3101 Park Center Drive, Alexandria, VA 22302.

See Illustrations V.F and V.G, "Temperature Requirements for Storing Foods" and "Proper Storage Temperatures," for guides to correct storage.

Organization of Dry Storage Area

There are some principles to orderly, efficient storage of foods and supplies that can be helpful:

- Store detergents separately from foods.
- Store heavy items at waist height or lower. Store lighter items up higher.
- Store least used items in the most inaccessible spaces.
- Store records for three (3) previous years in least accessible storage space.
- *Label areas* with *group name* and *shelves* with *item name*.
- Store only what is needed. Dispose of items that will not be used.
- Date cases when received, before placing on shelves.
- Store with identifying labels visible.
- Do not store items on floor.
- Empty cases as they are opened.
- Inventory space by space in order.
- Keep storeroom neat. Maintain good organization.

Arrange products in storage in same order as the items are listed on the inventory form. Taking inventory will go much faster. The arrangement of a storage area should be based on frequency of use. The more frequently used items should be nearest the kitchen.

The steps to arranging a storeroom are as follows:

1. Sketch storeroom on paper. Arrange storeroom into classifications, for example:

Food	Paper Supplies
Spices	Napkins
Condiments	Cups
Staples	Portioning Items
Fruits, canned and dried	Wraps
Vegetables, canned and dried	Straws
Meats and Meat Alternatives	Plates
Soups	Plastic Ware

Illustration V.F.

TEMPERATURE REQUIREMENTS FOR STORING FOODS

As used in this guide, "satisfactory" means this type of storage is acceptable; "preferred" means this type of storage maintains quality of the product for a longer period of time; and "required" means this type of storage is essential—there is no alternative.

Food	Dry Storage (50°–70°F.)	Refrigerated Storage (32°–40°F.)	Freezer Storage (0°F or below)
Dairy Products			
Butter		Satisfactory up to 2 weeks	Required over 2 weeks
Cheese, natural		Required	
Cheese, processed		Required	
Milk, canned	Satisfactory	Preferred	
Milk, fluid		Required	
Milk, non-fat dry	Satisfactory	Preferred	
Eggs			
Shell		Required	
Dried		Required	
Frozen			Required
Meat & Meat Products			
Frozen Meats, such as Ground Beef, Chicken, Pork Loins, and Turkey			Required
Cured Hams and Shoulders, Bacon, etc.		Required	
Canned Hams		Required	
Other Canned Meats, such as Beef and Gravy, Pork Luncheon Meat, Pork and Gravy, etc.	Satisfactory	Preferred	
Fat & Oils			
Cotonseed Oil, Lard, Olive Oil, and Vegetable Shortening	Satisfactory	Preferred	
Canned Vegetables			
Green Beans, Beets, Carrots, Corn, Green Peas, Tomatoes, Tomato Juice, Tomato Paste, Tomato Puree, etc.	Satisfactory	Preferred	
Canned Fruits			
Apples, Applesauce, Apricots, Blackberries, Cherries, Cranberry Sauce, Figs, Grapefruit Sections, Grapefruit Juice, Peaches, Purple Plums (prunes), etc.	Satisfactory	Preferred	
Fresh Vegetables			
Onions	Satisfactory	Preferred	
Potatoes, Irish	Satisfactory	Preferred (minimum 40°F)	
Sweet Potatoes	Required (minimum 55°F)		
Other fresh vegetables, such as Green Beans, Beets, Cabbage, Carrots, Spinich, etc.		Required	
Fresh Fruits			
Apples, Bananas, Peaches, Pears, Purple Plums, etc.		Required above 35°F	

Illustration V.F. continued

Food	Dry Storage (50°–70°F.)	Refrigerated Storage (32°–40°F.)	Freezer Storage (0°F or below)
Dried Vegetables			
Beans	Satisfactory for 60 days	Preferred	
Onions	Satisfactory	Preferred	
Dried Fruits			
Apples, Apricots, Peaches	Satisfactory for 2 weeks	Required Over 2 weeks	
Figs, Prunes, Raisins, etc.	Satisfactory	Preferred	
Cereal Products			
Regular Cornmeal, Whole Wheat Flour	Satisfactory for 60 days	Preferred	

Miscellaneous Food Items
Salad Items
Snack

Trays
Baking Paper Items

2. Arrange foods alphabetically within the classifications. For example, in the canned fruit section, arrange in the following order:

   Fruits, canned
   - Applesauce
   - Fruit Cocktail
   - Peaches
   - Pears

3. Label shelves. Color coding can also be helpful.
4. All labels should be turned outward where visible. The date should also be visible.
5. All cases should be stored properly on shelf, cases evenly on top of another case, or best side by side. Store cans in single file, always unpack cases that

Illustration V.G

PROPER STORAGE TEMPERATURES

Type	Temperature	Use	Characteristics
Dry—Cool	50°–70°	Semi-perishable and staple items	Well lighted Dry Well ventilated Easy to clean Well constructed shelves Floor racks Thermometer
Dry	—	Detergents Paper goods	Same as above
Refrigerated Reach-in or Walk-in	32°–40°	Perishables Semi-perishable Raw and cooked foods for short periods of time	Thermometer Adjustable shelves or floor racks
Frozen Food Storage	0° F. or below	Frozen foods	Thermometer Shelves or racks Properly wrapped packages

have been open and place cans on shelf. It is efficient to maintain food in unopened cases for ease in inventorying. Also, missing cases are usually more obvious than missing cans.

6. All open spices and bottles should have tops on and be closed.
7. All cases and bags are to be on shelves, nothing should be stored directly on the floor. Train staff to return items to proper places.
8. Storage areas should be convenient to receiving area and kitchen. It is particularly important that ventilation is sufficient to remove all odors and gases, and to prevent condensation on wall.
9. Dry storage areas are best kept at 40°F to 70°F with the lower temperature preferred.
10. Cleaning supplies should be stored separately from food.

Refrigerated Storage Area

Designate space for frozen and refrigerated foods by category. When arranging a refrigerated storage area, the following procedures may be helpful.

1. Assign sections of freezers or refrigerators to areas of production, such as cook's area, baker's area, etc.
2. Color coding on the outside of the refrigerator door may be helpful. In this way, each work area has a color code which is used as an indicator of where items are located. As an example:

   Main dish area - red
   Vegetable and salad area - green
   A la carte area - blue

3. Temperature should be 32-40°F, may rise a few degrees if door is opened and closed a lot. Check temperature three to four times a day, and always before leaving in the afternoon.
4. Food stored in refrigerated storage must be covered with foil, waxed paper, or lid; NOT toweling. When storing warm food, store in a shallow pan and cover lightly so steam can escape.
5. Store all food on shelves, so air can circulate. Never store cases or pans on the floor.
6. With wide-tipped magic marker, date all cases and all food items and be sure to use oldest first.

Freezer Storage Area

1. Freezer temperature should be 0°F or below (see Illustration V.G). Check temperatures three to four times a day, and always before leaving in the afternoon.
2. All meat should be wrapped tightly or well covered to avoid freezer burn.
3. All cases should be stored on shelves or four inches off floor if using metal racks.
4. Frozen foods are very sensitive to temperature change and should be stored as soon as they are received and not allowed to stand; once the food has been allowed to partially break down, the quality begins to deteriorate.
5. All cases should be dated and old cases moved to front of the shelf. Meat should be in one section and vegetables and other food in another, if enough freezer space to handle this way. This also saves time when pulling frozen food.

Central Warehouse

The storage of USDA commodities has required central warehousing for even some small districts. The commodity deliveries are often bunched and arrive in 6 to 12 month quantities.

Central warehousing of other foods may or may not be a savings. In some cases, it may be desirable or necessary even when it is not a savings, because of the smallness of some school foodservice programs and/or the distances the distributors have to come or other reasons.

Cost effectiveness should be checked and not taken for granted. How much is it costing the school district to deliver one case of product? How much does it cost the local distributor (or how much will the local distributor charge to deliver a case to the school district). Efficiency of the deliverer, whether school district or commercial distributor, makes the difference.

Good controls are necessary for a warehouse to be cost effective. The procedures for inventory control and for assuring proper temperature of the storage is maintained are two important factors.

INVENTORY CONTROL

Physical Inventory

Physical inventory is the process whereby each item on inventory is actually counted. It is best to have two employees take the inventory, one to do the actual counting and the other to do the recording on an inventory form. Multiply the current price paid per purchased unit by the quantity on hand to obtain the total dollar value of the products on hand.

An accurate food and supply physical inventory is usually required to be taken on the last day of the month. It is a good business practice. Also, the value of inventory is necessary for determining the cost of food used during the month (or the period of operations). Inventories may be taken several times during the month to determine food usage and quantities on hand prior to ordering. To obtain the value, multiply the number on hand of each item by the price paid. When each item has been extended, the value of each of the items in inventory is added together to derive a total value of the entire inventory.

The process of determining the value of food and supplies *used* is as follows:

Opening Inventory (beginning of month)
+ Purchases Made During Month
= Total Food or Supplies Available
− End of Month Inventory
= Cost of Food and Supplies Used During Month

Total cash value of deliveries received through the last day of the month *should be included* in the inventory total dollars for that month and in purchases made during the month.

What Is To Be Inventoried

All food and supplies stored in the refrigerators, freezers, storeroom, and kitchen should be included in the inventory, except small quantities of foods "in process." Every effort should be made to keep the "in process" foods at a minimum.

Illustration V.H

SAMPLE INVENTORY FORM

School: John Robinson High Date: Feb. 27, 1981

Item	Size	Ending Quantity	Unit Price		Ending Value	
CANNED FRUITS						
Applesauce	#10 can	5	1	92	9	60
Apples, Diced	#10 can	2	2	29	4	58
Fruit Mix	#10 can	3	3	21	9	63
Pears, Diced	#10 can	1	3	00	3	00

Purchased foods and USDA-donated foods should be inventoried separately. A sample inventory format is shown in Illustration V.H.

All detergents and paper supplies should be inventoried under proper categories. Common categories and inventory units area as follows:

Canned items .....inventory by cans and cases
Frozen foods .....inventory by pound and box or case
Meats.....inventory by pound and box and case
Packaged condiments .....inventory by cases or individually
Staples .....inventory by weight or packaged unit
Paper supplies .....inventory by tubes, sleeves, box, approximate numbers in case of foils, etc.
Spices .....inventory by ounces

Perpetual Inventory

A perpetual inventory is a cyclical process, whereas all items received are recorded (added) and all items withdrawn from inventory (used) are recorded (subtracted) on a daily basis. This is a must for a warehouse operation and a large central kitchen. The cost of labor has made it almost impractical to keep a perpetual inventory in the average kitchen. However, with computerization, it should be more practical and certainly desirable. Illustration V.I illustrates what information is in the typical perpetual inventory.

Physical inventories are necessary to assure that what the records show as being there is actually there. Pilferage and errors in recording can cause differences in the perpetual inventory and physical inventory.

Illustration V.1

PERPETUAL INVENTORY SAMPLE FORM

NAME OF ITEM
Applesauce

Date	Amount Rec'd	Supplier	Cost Case	Cost Unit	Amount Issued	Balance on Hand	Value $
3-30-80	previous inventory		12.00	2.00		1 cs	12.00
6-2-80					½ cs	½ cs	6.00
8-15-80	10 cs	Smith Supply	12.42	2.07		10½ cs	130.20

Pack: 6–10 cans
Description: Chunky, Unsweetened Grade A
**Brand:* Kings Ranson
***Minimum 1 cs
****Maximum 11 cs

*In large system this column might be used as the order/requisition number for local schools or sites to the central office.
*Date on case can be shown here on USDA donated foods.
**If using this form for USDA donated foods, you would show USDA or commodities as the brand name.
***This refers to minimum amounts needed to serve quantities required on planned menus until next delivery.
****This refers to maximum amount of this item you can store in the available storage space.
Courtesy of the Michigan Department of Education.

CHAPTER VI

SANITATION AND SAFETY

"Sanitation is a way of life. It is the quality of living that is expressed in the clean home, the clean farm, the clean business and industry, the clean neighborhood, and the clean community. Being a way of life, it must come from within the people; it is nourished by knowledge and grows as an obligation and an ideal in human relations."

. . . The National Sanitation Foundation

Some people do not have cleanliness as a quality of living and they do not comprehend the meaning of the word ***clean***. Therefore, the standard of cleanliness must be established by the manager. Something may be "clean" and not sanitary. Sanitary means it is free of bacteria. Therefore, in addition, the goals of a sanitation program are to (1) reduce the risks of disease, and (2) to protect the health and well being of the students and other customers.

There are several good references on sanitation. Each manager should have a good reference, such as *Sanitary Techniques in Foodservice*, Second Edition, by Karla Longree and Gertrude G. Blaker (John Wiley & Sons, Publishers, 1982). The local health department standards and mode of operation will be important to know.

FOOD POISONING

There is always the dread of food poisoning occurring. It is wise for each local district to determine policies for their personnel to follow in the case of suspected food poisoning. The local policy should contain the following components:

1. The name of the person in central administration who would be responsible to the press and contact the local health department.
2. Food samples should be obtained when food poisoning is suspected. A sample of *all* food served on the day of the incident should be retained for possible testing by the state or local board of health.
3. At the time of the suspected food poisoning, it is imperative (while it is still fresh in everyone's mind) that the names of the children affected and the time at which they ate be recorded. Also, they should be questioned as to where else they had eaten to determine if the contamination could be caused from food of other sources.
4. Check with the local health department to find out what their procedures are on the subject.
5. Have inservice programs for foodservice employees.

Food poisoning is caused by a poison or toxin that the bacteria has released into the food. Bacteria must be given a chance to multiply in food in order to cause a

reaction. In most cases, the typical reaction after consumption of a contaminated food is an upset stomach or discomfort in the intestinal area.

Food can be contaminated by bacteria in a variety of ways. Most of the diseases transmitted are of the respiratory tract or of the intestinal tract of man. Unwashed hands are a major vehicle for transmission.

FOOD-BORNE ILLNESS

Toxins may be produced by a bacteria in foods, when foods are improperly handled, prepared, stored, or served. The following comes primarily from Health Education and Welfare Publication No. (COC) 78-8237, published, 1978, and written by Frank L. Bryan.

Three food-borne illnesses are produced by toxins:

STAPHYLOCOCCAL POISONING (Staph)

INCIDENCE:	Common.
CAUSE:	Toxins produced by bacteria that are found in nose, throat, and skin infections. Toxins not destroyed by cooking.
COMMON FOODS:	Meat dishes (especially those handled a great deal), cream foods, gravies, and sauces.
SYMPTOMS:	Nausea, vomiting, diarrhea, and cramps which occur within two to six hours after consumption and the duration is not more than a day or two.
PREVENTION:	Store foods at or below 40°F and above 150°F. Exclude foodservice workers with respiratory illnesses and infected sores. Chill foods rapidly.

BOTULISM

INCIDENCE:	Rare.
CAUSE:	Toxin produced by bacteria in absence of air.
COMMON FOODS:	Underprocessed, home-canned, nonacid foods, smoked fish.
SYMPTOMS:	Nausea, vomiting, headache, dizziness, double-vision, and progressive respiratory paralysis. Occurs 12 to 36 hours after consumption. May be fatal in 3-10 days. Fatality Rate: 50-65%.
PREVENTION:	*Do not serve home-canned foods!* Discard suspected foods.

PERFRINGENS FOOD POISONING

INCIDENCE:	Common, gaining in incidence.
CAUSE:	Bacteria found almost everywhere. Grows without air and is resistant to heat.
COMMON FOODS:	Meat and gravy, soup, and stews all held at inadequate temperatures or allowed to cool slowly.
SYMPTOMS:	Nausea, diarrhea, and inflammation of stomach and intestines appear 8-24 hours after eating food. Duration of one day or less.
PREVENTION:	Chill foods quickly and keep refrigerated. Keep equipment clean. Practice good personal hygiene.

There are several important food-borne illnesses that are caused by the presence of the harmful bacteria in food. They are:

SALMONELLA FOOD INFECTION

INCIDENCE:	Common.
CAUSE:	Bacteria are widespread. Live in intestine of humans and animals.
COMMON FOODS:	Meats, porks, poultry, fish, eggs and egg products, baked goods with cream fillings.
SYMPTOMS:	Headache, abdominal pain, vomiting, fever, and diarrhea appear 12-36 hours after consumption. Duration of several days.
PREVENTION:	Wash hands often. Strict personal hygiene. Control rodents and insects. Keep equipment clean.

STREPTOCOCCUS FOOD INFECTION

INCIDENCE:	Rare.
CAUSE:	Bacteria found in intestinal tracts of humans and animals. Food must be contaminated with feces. Large numbers of bacteria must be present.
COMMON FOODS:	Meats, sausage, poultry, cream-filled pastries, and pudding.
SYMPTOMS:	Nausea, vomiting, colic-like pains, and diarrhea onset 2-36 hours. Relatively mild.
PREVENTION:	Prevent fecal contamination. Keep foods properly refrigerated and heated. Cook foods thoroughly. Thoroughly wash hands and equipment after working with raw meat.

BACILLUS CERUS

INCIDENCE:	Becoming more common.
CAUSE:	Bacteria found in soil and dust.
COMMON FOODS:	Custards, sauces, puddings, fried rice, and cereal.
SYMPTOMS:	Nausea, diarrhea, abdominal cramps and some vomiting. Incubation period of 8-16 hours. Short duration of one day or less.
PREVENTION:	Chill foods rapidly. Practice good personal hygiene. Hold hot foods at 150°F or above.

In addition, there are several more diseases worth mentioning that are caused by contaminated food. They are:

TRICHINOSIS—Parasite Disease

INCIDENCE:	Becoming less prevalent.
CAUSE:	Roundworm larva in muscle tissue.
COMMON FOODS:	Raw or uncooked pork.
SYMPTOMS:	Vomiting, diarrhea, fever, and muscular pain. Incubation period of 4-28 days. Duration of usually nine days.
PREVENTION:	Thorough cooking of pork to 165°F or above.

INFECTIOUS HEPATITIS

INCIDENCE:	Rare.
CAUSE:	Virus originating in feces, urine, and blood of infected human.

COMMON FOODS:	Shellfish, milk, orange juice, cold cuts, whipped cream cakes, and potato salad.
SYMPTOMS:	Fever, nausea, weakness, abdominal pain, and then jaundice. Causes injury to the liver. Onset 10-50 days. Duration of a few weeks to several months.
PREVENTION:	Cook shellfish thoroughly. Use uncontaminated water and practice good personal hygiene.

SHIGELLOSIS—Bacillary Dysentery

INCIDENCE:	Rare.
CAUSE:	Bacteria found in feces of infected humans transmitted by contaminated food and water.
COMMON FOODS:	Milk, beans, meat; and macaroni, potato, tuna and turkey salads.
SYMPTOMS:	Diarrhea, fever, cramps, chills, and dehydration—extremely variable in severity. Onset 1-7 days, usually less than 4 days.
PREVENTION:	Sanitary food and water sources. Good personal hygiene. Safe food handling practices. Cook foods thoroughly. Chill foods rapidly.

All fresh fruits and vegetables that are to be eaten raw or cooked, dried fruits and raisins, and raw poultry and fish should be washed carefully. This is especially true of the cavity of poultry, since it may be extremely rich in salmonella bacteria. Lukewarm running water should be used to wash fruits and vegetables; then rinse with cold running water and allow to drain. If insect infestation is suspected, allow the fresh vegetables to soak in cold, salted water for about 20 minutes. The insects will rise to the top and can be skimmed off. Poultry and fish should be washed shortly before cooking. A lukewarm wash followed by a cold wash is recommended.

Preventing an Outbreak of Food-borne Illness

Wash and sanitize equipment and work surfaces before using. Sanitize food and contact surfaces after you handle raw foods, before you handle cooked foods. An effective sanitizing solution can be made with chlorine bleach and water (200 ppm).

Hands should be washed frequently, particularly after using the restroom, after using handkerchiefs, sneezing, coughing, between operations, touching raw foods, and before beginning a new task.

It is important to not allow foods to remain at room temperatures for extended periods of time. Bacteria present will grow and multiply rapidly. When assembling foods, it is a good idea to wear disposable plastic gloves, but **never** wash these gloves for reuse.

Certain food products can be assumed to contain food-borne illness causing bacteria. These foods can be categorized into four groups:

1. RAW MEATS
2. RAW POULTRY
3. CRACKED EGGS
4. ALL FOODS (raw or cooked) that have been handled by either hands or machines.

These foods should be heated to 170°F internal temperature to destroy any bacteria that might be present. Be sure to stir foods so that the central mass reaches this temperature. A thermometer should be used to check the temperature.

Prevent Bacteria Growth

Bacteria grow and multiply when food is held in the Danger Zone, 40°F to 140°F. It is impossible to prevent food from being handled within this range. However, the amount of time that food is in this zone can be limited. Food should not be held in the 60°F to 120°F range for longer than two hours. This applies to ingredients used in the preparation of uncooked salads. Frozen foods should be properly thawed. Plan ahead by putting the foods needed in the refrigerator in advance to thaw. ***Never thaw foods at room temperature.*** Refreeze thawed foods with much caution. Foods that have reached room temperature or higher should not be refrozen. Cook them first, then refreeze them if necessary.

Chill foods as quickly as possible. **DO NOT** allow any food item to cool to room temperature first. When cooled at room temperature, the food travels slowly through the Danger Zone and bacteria present are allowed to multiply. Put foods in the refrigerator to cool and use shallow containers, so foods cool fast.

Whenever holding hot foods, maintain the temperature at a minimum of 150°F, preferrably at 165°F. Food should be at least 165°F before being transferred to holding equipment. Check temperatures of foods on the serving lines.

When transporting foods from a central kitchen to another school to be served, the food must be maintained at a temperature that is safe—cold foods cold, hot foods hot. Personnel should check the temperatures of the food upon arrival.

The Rule is: Keep Hot Foods Hot, Cold Foods Cold. Food should be maintained at temperatures of at least 150°F. You will need to keep the foods covered before service. This helps to maintain the warm temperatures throughout the food.

Cold foods should be refrigerated until service begins. Milk should be stored in a milk cooler. Cold foods and milk should be maintained at 40°F or below.

It is important to use the appropriate clean serving utensils, such as scoops, tongs, spatulas, and spoons properly. Plastic gloves can be used whenever hands are going to come in contact with the food. The students and adults should be able to pick up their forks, knives, and spoons by the handles, not the tines, blades, or bowls. Straws should be wrapped, or if unwrapped, served in an approved dispenser.

When handling plates or trays, be careful how you hold them. Touch them by the edges—never on the surface where you are going to put the food.

Good dishwashing practices are important for both health and aesthetic reasons. No one wants to eat off dirty trays or plates, or to eat with sticky flatware. When using mechanical dishwashers, follow these eight steps:

1. Check machine,
2. Start machine,
3. Prepare utensils—scrape dishes,
4. Prewash—soak flatware,
5. Rack utensils, put flatware in cones with handles down,
6. Put racks through dishwasher,
7. Remove racks from dishwasher, allow to dry,
8. Clean machine inside and out.

CHEMICAL POISONING

Chemical poisoning is not a common occurence. It usually occurs because of neglect or disorder. Cleaning compounds, pesticides, polishes, and similar products, when stored in the same general area as food products and unlabeled, are often the cause. The employee mistakenly grabs the toxic substance and uses in the preparation of food. ***Never store chemicals in the same area as foods. Always properly and clearly label all products.***

Metals may get into foods when unsuitable utensils are used. Lead, zinc, and copper can cause food poisoning. Pots and pans made of grey enamelware and galvanized containers should not be used, particularly with high-acid foods.

All cans should be checked before opening for corroding seams, bulging ends, and dents along the seams. The top of the cans should be washed. After opening, check for any off-odors, discolorations, and unusual appearance of the liquid portion. Meat product spoiling is indicated by off-odors and slimy surfaces. If any food has an off-odor, is cloudy in appearance, or is moldy, it should not be used. If any food looks suspicious, it should not be tasted, but rather thrown away.

Appendix I

Virginia Department of Education
Administrative Review Service

PROGRAM REPORT FOR FOOD SERVICE
Program Number 7

School Division _____ Date of Report _____
Date of Review _____

Program Description

Total number of schools in this division _____ .

Number of schools that participate in:	Number	Number of Schools Reviewed
a. National School Lunch Program		
b. National School Breakfast Program		

Latest month's division ADA
Average number lunches served daily during the month _____
Average number breakfasts served daily during the month _____
Percent of student participation daily during the month (lunches only) _____

A. Free and Reduced Price Meals Policies and Practices	Substantial Compliance		
	Yes	With Exception	No
1. A copy of the policy statement for free and reduced price meals is on file in each school reviewed.	___	_____	___
2. A public announcement explaining the policies was made available to the local news media for dissemination.	___	_____	___
3. Applications are received, eligibility is determined, children receive benefits, and parents are notified as prescribed by regulations.	___	_____	___
4. There are established and in use fair hearing procedures for parents' appeals and for school officials to challenge correctness of information in applications for continued eligibility.	___	_____	___
5. There is a designated person in each school to determine eligibility.	___	_____	___
6. There is a designated hearing official for appeals who was not involved in the original eligibility determination and who holds a position superior to that of the determining official.	___	_____	___
7. There is no evidence of discrimination, segregation, or overt identification of children receiving benefits.	___	_____	___
8. Collection procedures protect the anonymity of children receiving benefits.	___	_____	___

Exceptions and Comments:

	Substantial Compliance		
	Yes	With Exception	No
9. Provisions of the Right to Privacy Act are being adhered to.	___	_____	___
10. Appropriate records of approved, disapproved, withdrawn, and transfer applications, and results of hearings are maintained for three years plus the current year.	___	_____	___
11. Three percent or 3,000 (whichever is less) of all applications for free and reduced price meals on file as of October 31st had been properly verified within the five month timeframe from the first day of school.	___	_____	___
B. Food Service			
1. A program of student and parent involvement has been implemented.	___	_____	___
2. Breakfast and lunch menus are planned and served that meet U.S.D.A. requirements.	___	_____	___
3. The "offered vs. served" menus are planned and followed. (Required in high school, optional in middle, junior high, and elementary schools.)	___	_____	___
4. Only approved food and drink items are sold in school during lunch periods and income from the sale of these items is deposited in the food service account.	___	_____	___

Exceptions and Comments:

	Yes	Substantial Compliance With Exception	No
C. Food Purchase and Control			
1. A complete up-to-date inventory is maintained of:			
a. U.S.D.A. foods	—	_____	—
b. Other purchased foods	—	_____	—
c. Supplies	—	_____	—
D. Records and Recordkeeping			
1. A separate bank and/or ledger account is maintained for food service funds.	—	_____	—
2. Files of records, receipts, etc., are maintained for the required period of time. (3 years plus current year)	—	_____	—
3. Funds in the food service account are used only for food service activities.	—	_____	—
4. Interest earned on invested food service funds is credited to the food service account.	—	_____	—
5. Appropriate records are being maintained in accordance with applicable Civil Rights regulations.	—	_____	—
6. Records indicate that the number of free and reduced price meals served daily are compatible with the current number of correctly approved applications on file.	—	_____	—
7. Observation of the process and records indicate that procedures are being used at point of service to provide an accurate count of meals served.	—	_____	—
8. Adequate support records on program income, expenditures, value of non-cash donations, cash due the program, unpaid obligations, reimbursements, and meal count are being maintained.	—	_____	—
9. Financial records are audited annually by professional accountants who are approved by the School Board.	—	_____	—

Exceptions and Comments:

	Substantial Compliance	With Exception	No
E. Non-Food Assistance Program			
1. Equipment has been purchased under this program (during the past 12 years). Yes _____ No _____			
2. Equipment purchased under this program is in the school for which it was originally obtained and it is in use.	___	_____	___
3. Approval was obtained from the State Food Service Office prior to any disposition or relocation of this equipment and copies of the requests and approval are on file.	___	_____	___
4. Records of applications, invoices, and evidence of payment and reimbursement for equipment obtained under this program are properly maintained.	___	_____	___
5. An up-to-date inventory of this equipment is maintained (including identification and location).	___	_____	___
F. Management by Contract			
1. A management company has been contracted by the School Board to manage the school food service program. Yes _____ No _____			
2. Contract was made in accordance with requirements referred to in Regulatory Superintendents Memo No. 12, dated May 11, 1979.	___	_____	___
3. Prior approval from the State Food Service Office was obtained before the contract was signed.	___	_____	___

Exceptions and Comments:

S.L. 21
1981

VIRGINIA SCHOOL FOOD SERVICE
Supervisory Review Report
School Lunch, Breakfast and Special Milk Programs

Date of Last Review

Date of This Review
November 14, 1984

1. SCHOOL DIVISION

2. Name and Address of School
Rocky Run
4400 Stringfellow Road
Chantilly, Virginia 22021

3. Review of
X Lunch
____ Special Milk
____ Breakfast

4. Grades Participating
7 To 8

5. Campus
____ Open X Closed

6. Type of Food Service
____ Breakfast
____ Milk
X Type A Lunch
____ A La Carte

7. Hours of Operation
Breakfast:
____ To ____
Lunch:
10:20 a.m. To 12:50 p.m.

8. Milk Serving
Before School ____
Midmorning ____
Lunch ____
Midafternoon ____

Type of Food Service	9. Price Charge To: Students							10. Participation Data (Last Month)		
	Daily		Weekly		Other		Adults			
	FP	RP	FP	RP	FP	RP	Daily	ADA	ADP	Percent (ADP to ADA)
Breakfast										
Lunch	.85	.40					1.30			School figures 60.6%
Milk	.25						.25	xxxxx	Sold Free	xxxxx

11. Is the income from the sale of all food and drink items sold during the lunch period deposited in the food service account and used only for the food service program? (If "No," explain)

Yes X No ____

SCHOOL Rocky Run Date November 14, 1984

I. Free and Reduced Price Policy And Practices

	Yes	No	Comments:
1. Is school's performance, re: free and reduced price, in compliance with approved policies and procedures? (If "No," explain)	X		
a. Is a copy of the approved policy statement on file in the school?	X		
b. Did the school distribute the letter, income scale, and application to all students at beginning of school? If "No," give reasons.	X		
c. Does the school follow the collection procedures outlined in the approved Policy Statement? If "No," explain.	X		
d. Does it appear that the anonymity of children receiving free and reduced price meals is protected by collection methods used?	X		

2. Review of Free and Reduced Price Applications

a. Number Approved For:	
Reduced Price	16
Number Correct	16
Number Should Be Free	
Number Should Be Full Price	
Number Having Insufficient Information	
Free	24
Number Correct	24
Number Should Be Reduced Price	
Number Should Be Full Price	
Number Having Insufficient Information	
b. Number Disapproved	0
Number Correct	
Number Should Be Reduced Price	
Number Should Be Free	
Number with Insufficient Information	

	Yes	No	Comments:
3. Do all applications show			
a. Approved for free, reduced price, or disapproved	X		
b. Reason for disapproval	N/A		
c. Date of approval or disapproval	X		
d. Signature of approving official	X		
e. Date of student withdrawal, change in eligibility, or other action taken by school	X		

SCHOOL Rocky Run Date November 14, 1984

I. Free and Reduced Price Policy And Practices

	Yes	No	Comments:
4. Are applications retained for 3 years plus current year?	X		
5. Were parents sent a notification of approval or disapproval? If "No", explain.	X		
6. In the current school year, how many appeals were made by parents challenging the decision of the designated official re: the application submitted for a free or reduced price meal?	0		
a. How many of these appeals were upheld?			
b. In cases where appeal(s) were upheld, give major reasons for reversals.			
7. In the current school year, has the school challenged the eligibility of any child receiving free or reduced price meals?		X	
If so, in how many cases were the children determined to be eligible?			
8. Is the person responsible for distributing tickets, tokens, etc. provided the names of free and reduced price recipients?	X		
a. Is the list kept up-to-date showing withdrawals, additions, changes in eligibility, etc.?	X		

9. Number of eligible recipients and meals served on day of visit.

	Approved to Date	(−) Withdrawn	(=) Eligible	Meals Served
Reduced	16	0	16	9
Free	24	1	23	15

	Yes	No	Comments:
a. Are the number of meals recorded on day of visit within the range of number eligible?	X		
b. Was the school instructed to correct the meal count? If "No", give reason.	N/A		
10. Do records for the past month indicate free and reduced price meals served each day do not exceed the number of students eligible in each category? If "No", list number of each overclaim by dates and amount of overclaim.	X		
Was the school instructed to submit a corrected report(s)? If "No", give reason.	N/A		

II. Civil Rights

1. Does the school apply the policies and guidelines contained in the approved policy statement uniformly, without regard to race, color, or national origin?	X		

SCHOOL Rocky Run Date November 14, 1984

I. Free and Reduced Price Policy And Practices

	Yes	No	Comments:
2. Does the school require any separation by race, color, or national origin:			
a. In eating areas?		X	
b. In serving lines?		X	
c. In seating arrangements?		X	
d. In assignment of eating periods?		X	
If "Yes", explain in "Comments".			
3. Does it appear the school is in compliance with Title VI of the Civil Rights Act of 1964?	X		

III. MEAL ANALYSIS ON DAY OF VISIT (OFFERED VS. SERVED)

Lunch Menu	Planned Portion Size
Crispy Fried Chicken	
Cinnamon Roll—Grannys	
Cheeseburger	
Sausage or Cheese Pizza	
Choice of Two	
Vegetable of Day—brocolli	
School Made Vegetable Soup	
Coleslaw, Sandwich Fixing, Fruit Cup	

Type A Lunches Served

Students:	W/M	+	
Paid	566	+	42
Reduced	4	+	5
Free	15	+	___
Total	632	+	___

Adults:	
W/M	___
WO/M	___
Total	32
Employees:	
W/M	___
WO/M	10

IV. Menu Planning

	Yes	No	Comments:
1. Are menus planned at least one month in advance?	X		
2. Are students provided a choice of items within a component?	X		A salad bar is offered daily as well as sandwich.
3. Are USDA aids used:			
a. Menu Planning Guide	X		
b. Food Buying Guide	X		
c. Quantity Recipe File	X		

SCHOOL Rocky Run Date November 14, 1984

I. Free and Reduced Price Policy And Practices

	Yes	No	Comments:
4. Based on two weeks menus:			
a. Are menus planned as a unit to provide the complete Type A lunch requirement?	X		
b. Do the menus planned contain the required components? If no, explain.	X		
c. Do the menus planned contain the required size portions? If no, explain.	X		
d. Are USDA foods used to advantage?	N/A		4d. Fairfax County is participating in the USDA pilot study for commodities. A letter of credit is issued rather than donated commodities.

SCHOOL Rocky Run November 14, 1986

Analysis of Meal Pattern (Lunch)

Menu Food Item and Serving Size	Meets Type A Requirements	Does Not Meet Type A Requirements	Suggestions for Meeting Requirements
November 10, 1986	X		
November 11, 1986	X		
November 12, 1986	X		
November 13, 1986	X		
November 14, 1986	X	Battered fried Fish 3 oz. portion = 1 oz. meat 1 oz. cheese added	
November 17, 1986	X		
November 18, 1986	Provided the taco served is a super taco shell.		
November 19, 1986	X		
November 20, 1986	X Beef burrito = 2 oz. m/ma		
November 21, 1986	X	Nachos #12 scoop chili #16 cheese sauce	

SCHOOL Rocky Run DATE November 14, 1984

V. Meal Served

	Yes	No
1. Are students informed of the "offer vs. served" regulations?	X	
2. Were correct size of utensils used in serving?	X	
3. Did the meal have eye appeal?	X	
4. Is there variety in color?	X	
5. Were foods served at appropriate temperatures?	X	

Comments:

VI. Personnel And Production

1. Employees

	Number	Total Hours Per Day
Manager(s)		
Cook(s)		
Other(s)		
TOTAL	9	46

2. Total meals served on day of visit 674 *does not include ala carte

3. Meals per man hour on day of visit (Total Meals divided by Total Hours)

4. Are work schedules and job assignments posted and followed? (If no, explain)	X	
5. Are work schedules and job assignments adequate for maximum use of personnel and equipment?	X	

Comments:

Including ala carte an average of 1 meals per man hour are served. An average number of meals served daily for November is 608 students and 55 adults.

VII. Accountability

1. Does the menu served contain at least three of the required components of the Type A lunch? If no, explain.	X	
2. Do the portions planned and served appear to meet the Type A lunch requirement? If no, explain.	X	
3. Is this meal eligible for reimbursement?	X	
4. a. Do procedures provide for an accurate count at point of service of meals served with and without milk?	X	

Comments:

4a) Cash registers are used on the serving lines to tally counts by category.

SCHOOL Rocky Run DATE November 14, 1984

V. Meal Served

	Yes	No	Comments:
b. Is the point of service count recorded on the daily record and used for making monthly claims for reimbursement?	X		
5. Does the number of free meals and the number of reduced meals exceed the current number approved for each? If yes, explain.		X	
6. Has the number of free and reduced price meals exceeded the approved number at anytime during the year to date? If yes, explain.		X	
7. Does it appear there is an accurate count of items sold and an accurate count of funds received for each sale? If no, explain.	X		

VIII. Records and Recordkeeping

			Comments:
1. Who is responsible for keeping records? X Manager X Other (explain) Central School Food Service Office			
2. Is an operating budget followed?	X		
3. Is an estimate made of potential income and a comparison made periodically against actual income?	X		
4. Are records being maintained for equipment on hand?	X		
5. Are records of depreciation maintained on equipment?	X		
6. Does the school maintain a separate bank or ledger account for food service funds?	X		
7. Are any food service funds deposited in savings and/or other accounts?	X		
8. Are those funds included in the "Statement of Cash Account" reported on the monthly SL-13 report?	X		
9. Does the interest earned on the invested funds accrue to the food service account?	X		
10. Does the school maintain adequate records on: Program Income, Expenditures, Value of non-cash donations, Cash due the program, Unpaid Bills? If "No," explain.	X		
11. Does the school retain files of records, receipts, etc., for 3 years plus current year?	X		
12. What was the program's operating balance last month?			

SCHOOL Rocky Run DATE November 14, 1984

V. Meal Served

Cash Balance	+ Reimbursement Due	− Unpaid Obligations	= Operating Balance	Yes	No	Comments:
						12. This balance is not available for this individual school.
13. Is this balance more than operating needs?					X	13. The balance for the central school food service account does not reflect a balance more than operating needs.

IX. Competitive Foods—Student and Parent Involvement

	Yes	No	Comments:
1. Is the Sale of competitive food and drink items with "minimum nutritional value" to students on the school premises prohibited from the beginning of the school day until after the close of the last lunch period? (If "No," explain)	X		
2. Has a program of student and parent involvement been implemented in the school division?	X		

X. Summary and Recommendation

1. **General Comments** This excellent program is under the direction of Mrs. Sandra Leverman. The serving line was merchandised and displayed very well. Although the menu offered did not provide many salad participants, the salad bar was attractive and inviting. Mrs. Leverman's ability to schedule as well as staff cooperativeness allowed the kitchen area to be exceptionally organized and clean during service. Although the stockroom was well organized, it is recommended items be stored off the floor or on pallets.

2. Summarize Major Problems Found	2. List Recommendations Made to the Sponsor's Representative or Other Officials
N/A AN EXCELLENT FACILITY!	

SCHOOL REVIEWED BY

Name

Appendix II

Standards Governing State And Local Grantee Procurement; Attachment O Of OMB Circular A-102

This Attachment establishes standards and guidelines for the procurement of supplies, equipment, construction and services for Federal assistance programs. These standards are furnished to ensure that such materials and services are obtained efficiently and economically and in compliance with the provisions of applicable Federal law and Executive orders.

The USDA established new regulations requiring procurement on the basis of bids for all purchases or purchasing contracts of more than $10,000 and construction contracts exceeding $2000. The new regulations require bidding by school food authorities at the local level.

Selection Procedures

a. All procurement transactions, regardless of whether by sealed bids or by negotiation and without regard to dollar value, shall be conducted in a manner that provides maximum open and free competition consistent with this attachment. Procurement procedures shall not restrict or eliminate competition. Examples of what is considered to be restrictive of competition include, but are not limited to: (1) placing unreasonable requirements on firms in order for them to qualify to do business, (2) noncompetitive practices between firms, (3) organizational conflicts of interest, and (4) unnecessary experience and bonding requirements.

b. The grantee shall have written selection procedure which shall provide, as a minimum, the following procedural requirements:

(1) Solicitations of offers, whether by competitive sealed bids or competitive negotiation, shall:

(a) incorporate a clear and accurate description of the technical requirements for the material, product, or service to be procured. Such description shall not, in competitive procurements, contain features which unduly restrict competition. The description may include a statement of the qualitative nature of the material, product or service to be procured, and when necessary, shall set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a "brand name or equal" description may be used as a means to define the performance or other salient requirements of a procurement. The specific features of the named brand which must be met by offerors shall be clearly stated.

(b) clearly set forth all requirements which offerors must fulfill and all other factors to be used in evaluating bids or proposals.

(2) Awards shall be made only to responsible contractors that possess the potential ability to perform successfully under the terms and conditions of a proposed procurement. Consideration shall be given to such matters as contractor integrity, compliance with public policy, record of past performance, and financial and technical resources.

Method of Procurement

Procurement under grants shall be made by one of the following methods, as described herein: a) small purchase procedures; b) competitive sealed bids (formal advertising); c) competitive negotiations; d) noncompetitive negotiation.

a. Small purchase procedures are those relatively simple and informal procurement methods that are sound and appropriate for a procurement of services, supplies or other property, costing in the aggregate not more than $10,000. Grantees shall comply with State or local small purchase dollar limits under $10,000. If small purchase procedures are used for a procurement under a grant, price or rate quotations shall be obtained from an adequate number of qualified sources.

b. In competitive sealed bids (formal advertising), sealed bids are publicly solicited and a firm-fixed price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is lowest in price.

(1) In order for formal advertising to be feasible, appropriate conditions must be present, including as a minimum, the following:

(a) A complete adequate and realistic specification or purchase description is available.

(b) Two or more responsible suppliers are willing and able to compete effectively for the grantee's business.

(c) The procurement lends itself to a firm-fixed price contract, and selection of the successful bidder can appropriately be made principally on the basis of price.

(2) If formal advertising is used for a procurement under a grant, the following requirements will apply:

(a) A sufficient time prior to the date set for opening of bids, bids shall be solicited from an adequate number of known suppliers. In addition, the invitation shall be publicly advertised.

(b) The invitation for bids, including specifications and pertinent attachments, shall clearly define the items or services needed in order for the bidders to properly respond to the invitation.

(c) All bids shall be opened publicly at the time and place stated in the invitation for bids.

(d) A firm-fixed price contract award shall be made by written notice to that responsible bidder whose bid, conforming to the invitation for bids, is lowest. Where specified in the bidding documents, factors such as discounts, transportation costs and life cycle costs shall be considered in determining which bid is lowest. Payment discounts may only be used to determine low bid when prior experience of the Grantee indicates that such discounts are generally taken.

(e) Any or all bids may be rejected when there are sound documented business reasons in the best interest of the program.

Contracting with Small and Minority Firms, Women's Business Enterprise and Labor Surplus Area Firms

a. It is national policy to award a fair share of contracts to small and minority business firms. Accordingly, affirmative steps must be taken to assure that small and minority businesses are utilized when possible as sources of supplies, equipment, construction and services. Affirmative steps shall include the following:

(1) Including qualified small and minority businesses on solicitation lists.

(2) Assuring that small and minority businesses are solicited whenever they are potential sources.

(3) When economically feasible, dividing total requirements into smaller tasks or quantities so as to permit maximum small and minority business participation.

(4) Where the requirements permit, establishing delivery schedules which will encourage participation by small and minority business.

(5) Using the services and assistance of the Small Business Administration, the Office of Minority Business Enterprise of the Department of Commerce and the Community Services Administration is required.

(6) If any subcontracts are to be let, requiring contractor to take the affirmative steps in 1 through 5 above.

(b) Grantees shall take similar appropriate affirmative action in support of women's business enterprises.

(c) Grantees are encouraged to procure goods and services from labor surplus areas.

Contract Pricing

The following types of procurement instruments are not allowed under Amendment 28:

A. Cost Plus a Percentage of Cost Contract, which specifies that a vendor is reimbursed for the purchase price of goods or service, plus a percentage of that cost.

B. Cost Plus Percentage of Income Contract, which specifies that a vendor is reimbursed for the purchase price of the goods or services, plus receives a percentage of total program income.

Both of the above contracts are not allowed since they offer an incentive to the vendor to raise his costs and therefore raise program costs.

Grantees shall perform some form of cost or price analysis in connection with every procurement action including contract modifications. Costs or prices based on estimated costs for contracts under grants shall be allowed only to the extent that costs incurred or cost estimates included in negotiated prices are consistent with Federal cost principles.

Grantee Procurement Records

Grantees shall maintain records sufficient to detail the significant history of a procurement. These records shall include, but are not necessarily limited to, information pertinent to the following: rationale for the method of procurement, selection of contract type, contractor selection or rejection, and the basis for the cost or price.

Contract Provisions

In addition to provisions defining a sound complete procurement contract, any recipient of Federal grant funds shall include the following contract provisions or conditions in all procurement contracts and subcontracts as required by the provision, Federal Law or the Grantor Agency.

(a) Contracts other than small purchases shall contain provisions or conditions which will allow for administrative, contractual, or legal remedies in instances where contractors violate or breech contract terms, and provide for such sanctions and penalties as may be appropriate.

(b) All contracts in excess of $10,000 shall contain suitable provisions for termination by the grantee including the manner by which it will be effected and the basis for settlement. In addition, such contracts shall describe conditions under which the contract may be terminated for default as well as conditions where the contract may be terminated because of circumstances beyond the control of the contractor.

(c) All contracts awarded in excess of $10,000 by grantees and their contractors or subgrantees shall contain a provision requiring compliance with Executive Order 11246, entitled "Equal Employment Opportunity," as amended by Executive Order 1375, and as supplemented in Department of Labor regulations (41 CFR Part 60).

Sample For Annual Invitation To Bid
Guidelines

July 15, 1985

SUBJECT: Bread Bids

Dear Sir:

You are invited to submit a bid on breads for the DOE Public Schools Food Services for the 1985–86 school year.

It is understood and agreed that the following conditions are a part of the proposed bid:

1. The DOE City Board of Education reserves the right to accept or reject any or all bids.
2. All bid proposals shall be submitted on forms provided by the DOE Public Schools (two copies attached). Submit one copy of proposals in sealed envelope plainly marked "Bids for DOE Public Schools Food Services." Respond on the attached bid form. No bid on any item will be accepted on any form other than the attached bid of the DOE Public Schools Food Services.
3. All requested information must be completed for each item. Bid must include weight of each item, cost per pack, and cost per item.
4. The bids will be for all schools and the bread will be delivered to each school on dates, in quantity and type, requested by the Director.
5. If bids are identical, the Board of Education reserves the right to any action felt will best serve the interest of the students in the school system.
6. Three invoices should be left at each school upon delivery. Monthly statements will be submitted for each school through the last day of the preceding month by the third work day of the following month and mailed to DOE Public Schools Food Service, (address).
7. The bids will be received in the Board Room, Administration Building, DOE Public Schools, (address) up to 10:00 AM Wednesday, August 11, 1985.

J. S. Smith
Manager of Operations
DOE Public Schools
Your Street
Your Town, N.C.

Courtesy of North Carolina Department of Public Instruction and North Carolina Foodservice Distributors and Suppliers Association

Appendix III

INVITATION TO BID FOR FOOD AND MERCHANDISE AND TERMS OF AGREEMENT

The Board of Education of the Doe Public Schools requests written and sealed bids on the following items to be submitted to the manager of Operations on or before 10:00 AM *Wednesday, November 7, 1985*. Bids may be mailed to the Manager of Operations, Doe Public Schools, (address), or delivered to the office of the Manager of Operations, Doe Public Schools, (address). Said bills will be publicly opened by the designated representatives of the school board at 10:00 AM on that date.

The Board reserves the right to accept or reject any or all bids in whole or part in the best interest of the Doe Public Schools.

Policies:

1. The bid covers the period from *December 1, 1985* through *February 28, 1986*, inclusive, and vendors receiving awards shall be the sole suppliers for items for that period. If vendors cannot supply items, they must:
   a. Attempt to obtain equal items from other sources and deliver to Doe Public Schools Child Nutrition facilities at the bid price, or
   b. Inform Doe Public Schools Child Nutrition Program that they cannot deliver items and pay the difference in bid price and price secured by Doe Public Schools Child Nutrition Program.
2. All bid proposals shall be submitted on forms provided by the Doe Public Schools (two copies attached). Submit *six copies* of each bid in sealed envelopes plainly marked "Food and Merchandise Bid for Doe Public Schools Child Nutrition Program." No bid or any item will be accepted on any form other than the attached bid of the Doe Public Schools Child Nutrition Program.
3. Bidders are requested to identify each sheet of the bid form by inserting at the top of each sheet, in the space provided, the signature of one of the officers of the company.
4. No contract may be assigned, sublet, or transferred.
5. Where brands are listed, no alternate will be accepted unless a comparable brand is named. In such cases a sample must be submitted, free of charge, or the item will not be considered. All food bids must be of current year's pack and containers in good condition, with a shelf life of at least six months, and a guarantee against swells for the period of time.
6. Nutritional analyses and/or CN labels are required on all food claiming to meet USDA meal pattern requirements; such as canned meat products, etc. Each bidder must have available copies of CN labels or nutritional analyses. Bidders must complete and return nutrient analysis forms for starred (*) items. (See sample form enclosed.)
7. Prices quoted shall be net, including transportation and delivery charges fully prepaid by the contractor. No delivery charges will be paid by Doe Public Schools. Prices will be firm and not subject to adjustment.

8. All deliveries are to be drop delivered to the thirty-seven individual Doe Public School Child Nutrition facilities between 7:30 AM and 2:30 PM, Monday through Friday, except during holidays. Delivery shall be made once each week to each school. When necessary, additional weekly deliveries shall be made to each school.
9. For frozen foods, the carriers must be properly insulated, with temperature controlled, to deliver all produce in a hard frozen state, 0° or below.
10. All orders must be picked up by each successful bidder from the office of the Doe Public Schools, Child Nutrition Program.
11. Three (3) copies of each invoice must be left at each school. Statements are to be mailed to the Doe Public Schools Child Nutrition Program, (address), no later than the third work week of the following month.
12. Purchase Orders of an approximate dollar amount will be issued monthly. This Purchase Order number must appear on all invoices for the appropriate month. Separate invoices will be required for the following:
    Code 1412 —Cleaners, detergents, rubber gloves. (Non-food processing supplies)
    Code 1433—Plastic gloves, straws and dispensers, napkins and dispensers, disposables (paper cups, plates, plastic forks, spoons, paper towels, etc.), foil, cling wrap, pan liners. (Food processing supplies)
    Code 1431—Food

J. S. Smyth, Manager of Operations
Doe Public Schools

Index

A

Absences (employees), 32
Administration, 1
  Centralized, 14
  Decentralized, 14
  Organization Chart, 23
Adult Prices, 17
A La Carte, 9
Allergies, 10

B

Bacillus Cerus, 73
Bacteria, 75
Banquets, 12
Bid buying, see Purchasing, 55
Botulism, 72
Breakfast Program, 2, 51
  Menus, 51
  Requirements, 51
Budget, 22

C

Cash Handling, 20
Centralized Administration, 14
Charging, 17
Child Care, 11
Child Nutrition Act, 2
Child Nutrition Programs, 1
Classification, 35
Clostridium Perfrigens, 72
Collective Purchasing, 56
Commodities (USDA Donated Foods), 3, 63
Competitive Foods, 9
Convenience Foods, 45
Counting Money, 20

D

Day Care, 11
Destaffing, 36
Director of Foodservice, 23
Disaster Feeding, 4, 12
Disciplinary Action, 37
Distribution of Commodities, 3

E

Emergency Food, 12
Employer, 23
Employment Practices, 30
Evaluation, 36

F

Financial Management, 16
Foodservice Assistant, 28
Free and Reduced-Price Meals, 2
Fringe Benefits, 31

G

Grievance, 44

H

Handicapped Children, 10
Head Start, 11
Home Economics, 4

I

Infectious Hepatitis, 73
Inventory, 68

J

Job Descriptions, 23

L

Labels, 63

M

Management Company, 12
Manager, 25
Menu, 46
  Breakfast, 51
  Cycles, 47
  Lunch, 47
  Planning, 46

N

National School Lunch Act, 3
Nutrition Education, 5

O

Offer Versus Served, 2, 47
On-Site Production, 45

P

Participation, 21
Personnel, 23
Physical Examination, 32
Poisoning, 76
Price Charged, 17
Production, 45
Production Record, 52
Purchasing Food, 54

R

Resignation, 44
Revenue, 16
Reimbursements, 16
Records, 52
Retirement Plan, 32
Rosters, 19

S

Salaries, 32
Salmonella, 73
Sanitation, 71
Satelliting, 45
Senior Citizens, 11
Shigellosis, 74
Sick Leave, 31
Special Milk Program, 3
Specifications, 56
Staffing, 33
Standards of Identity, 61
State Department of Education, 6
Storage, 63
Streptococcus, 72
Summer Foodservice, 11

T

Tickets, 19
Trichinosis, 73

U

Unsatisfactory Work, 37
United States Department of Agriculture, 3, 5
Use of Funds, 22

V

Vacancies, 30